

# Personal Document Locator

Please keep in a secure location

## Part A – Personal Information

Spouse 1	Spouse 2
Name (first, middle, last)	Name (first, middle, last)
Street Address	Street Address
City, State, ZIP	City, State, ZIP
Date of Birth	Date of Birth
Place of Birth	Place of Birth
Social Security Number	Social Security Number

## Part B – Trusted Family and Friends

	Name	Phone Number	Email
Family			
Friends			

## Part C – Trusted Contacts

	Name	Phone Number	Email
Attorney			
Insurance Agent			
Tax Preparer			
Financial Advisor			
Other			

## Part D – Income Sources

Source	Amount	Frequency
Social Security		
Pension - Survivor Benefit (Y/N) - What %? (100%, 75%, 50%)		
Rental Income		
Royalties		
Investment Portfolio		
Annuities		

## Part E – Automatic Payments

Source	Amount	Frequency
Mortgage		
HELOC		
Auto		
529 accounts		
Other		

## Part F – Credit Cards

Cardname/Bank/Holder	Card # (Last 4)

## Part G – Important Documents Checklist

Personal Document	Where are they located?
Will(s)	
Durable Power of Attorney	
Healthcare Directives	
Trust Agreements	
Birth Certificate(s)	
Social Security Card(s)	
Marriage Certificate	
Military Papers	
Adoption Papers	
Divorce/Separation Papers	
Vehicle Titles	
Deeds	
Safety Deposit Box/Keys	
Bank Account Records	
Tax Returns	
Mortgage and Loan Papers	
Insurance Policies – Home & Auto	
Insurance Policies – Life	
Insurance Policies – Health	
Business Papers (incorporation, trademark, patents, etc.)	
Retirement Account Papers (IRAs, pensions, annuities, etc.)	
Investment Account Papers (taxable accounts, stocks, bonds, etc.)	
Proof of Citizenship	
Important Keys	
Antiques and Heirlooms	
Jewelry	
Cash	
Funeral Instructions (e.g., cemetery plot deed, burial instructions)	
Notes	

