



*Keeping an inventory of your personal and legal documents is as easy
as A B C with the . . .*

Personal and Legal Document Locator

A little organization today will help your beneficiaries tomorrow!

PERSONAL AND LEGAL DOCUMENT LOCATOR

Name

Social Security Number

Date of Birth

Location of my valuable property and important papers (list address if needed)

Location A

Location B

Location C

Location D

Itemized list of valuable property and important papers. Circle the location of each item.

LOCATION	PERSONAL PAPERS	LOCATION	INSURANCE POLICIES	LOCATION	FINANCIAL RECORDS-ASSETS
A B C D	Adoption certificates			A B C D	Business agreements
A B C D	Birth certificate	A B C D	Accident	A B C D	Debts owed to you
A B C D	Death certificates of family members	A B C D	Car, boat, etc.	A B C D	List of checking, savings, and other accounts
A B C D	Diplomas	A B C D	Funeral plan		
A B C D	Divorce/Separation papers	A B C D	Health	A B C D	Mortgage deed(s)
A B C D	Marriage certificate	A B C D	Homeowner/Renter	A B C D	Stocks and bonds
A B C D	Medical records	A B C D	Life	A B C D	Titles (car, boat, etc.)
A B C D	Military records	A B C D	Long-term care	A B C D	_____
A B C D	Naturalization papers	A B C D	Mortgage	A B C D	_____
A B C D	Passport	A B C D	_____		
A B C D	Social Security card				
A B C D	_____				
A B C D	_____				
A B C D	_____				
	PERSONAL-OTHER		ESTATE RECORDS		FINANCIAL RECORDS-LIABILITIES
A B C D	Auto registration	A B C D	Cemetery plot papers	A B C D	Auto loan
A B C D	Income tax records	A B C D	Funeral and burial instructions	A B C D	Business agreements
A B C D	Keys to home, car, buildings, and other locks	A B C D	Gift tax returns	A B C D	List of credit card(s)
		A B C D	List of people to contact upon death	A B C D	Mortgage note(s)
A B C D	Post Office box key		Living Will/Medical power of attorney	A B C D	Personal loans
A B C D	Safe combination	A B C D	My will (copy)	A B C D	_____
A B C D	Safe deposit box key and location	A B C D	My will (original)	A B C D	_____
		A B C D	Power of Attorney		RETIREMENT INCOME
A B C D	_____	A B C D	Spouse's will (copy)	A B C D	401(k), 457, 403(b), IRA, etc.
A B C D	_____	A B C D	Spouse's will (original)	A B C D	Military pension
A B C D	_____	A B C D	Trust agreements	A B C D	Pension plan
		A B C D	_____	A B C D	Social Security
		A B C D	_____	A B C D	_____

Copies given to:

Date prepared:

Please see back for additional information

PERSONAL AND LEGAL DOCUMENT LOCATOR

Name(s) and Telephone Number(s) of Personal and Professional Advisers

Executor/Executrix/Administrator of Estate

Attorney

Accountant

Insurance Agent

Retirement Plan

Clergy

Physician

Stockbroker

Other

FINANCIAL ACCOUNTS (detail)

Account Name

Account Number

Safe Deposit Box Location _____

Post Office Box Location _____

Other Location Information _____

After completing this document locator:

- Update every year or two.
- Keep one copy at home, file a copy in a safe place, and give one to a relative(s) and one to your attorney.
- Inform your family where it is located.
- Don't put your only copy in a safe deposit box.

This document locator is provided to you compliments of

TVA Retirement Services

400 West Summit Hill Dr., Knoxville, TN 37902

800-824-3870