

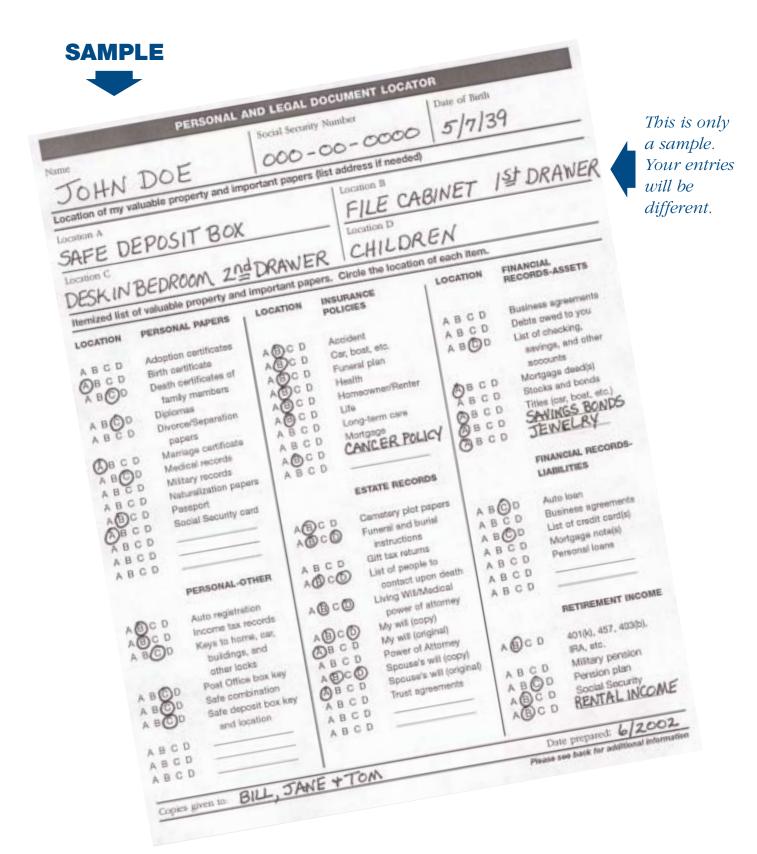
Keeping an inventory of your personal and legal documents is as easy as A B C with the . . .

## Personal and Legal Document Locator

A little organization today will help your beneficiaries tomorrow!

This document locator is designed to help you organize your important papers and records. It provides a convenient and concise way to summarize the location of vital documents.

If you do not currently have all of your documents in order, there's no time like the present to get organized. Gather all of your records—such as beneficiary forms, etc.—and review them to make sure they are all up to date. If the documents that your beneficiaries find upon your death are out of date, they will be of little value. This locator will also help remind you of things you need to do as part of your estate planning.



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

Copies given to:

Date prepared:

## 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 decrement leaster.				

## 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.