Personal Document Locator

Part I: Personal Information

The Personal Document Locator is an organized detailed list of your primary professional contacts, as well as a list of where you have important records and documents stored. Keep this list in a secure place at home and be sure a trusted person, like a family member or friend, is aware of its location. You may want to provide a copy to that person, to your executor, and/or your attorney.

Remember to update The Personal Document Locator at least once a year to ensure its accuracy.

Name (first, middle, la	st):	
Street Address:		
City, State, Zip:		
Social Security Numb	er:	
Date of Birth:		
Diagonal Divide		
Place of Birth:		



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Part II: Personal Contacts



Attorney	Tax Preparer
Name:	Name:
Firm Name:	Firm Name:
Address:	Address:
City, State, Zip:	City, State, Zip:
Phone Number(s):	Phone Number(s):

Financial Advisor
Name:
Firm Name:
Address:
City, State, Zip:
Phone Number(s):

Insurance Agent		
Name:		
Firm Name:		
Address:		
City, State, Zip:		
Phone Number(s):		



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Part III: Online Accounts



Website/Account	Username	Password

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Part IV: Location Key

Specify the location(s) where you keep your documents (e.g., home, office, safe, safe deposit box). For each item in Part V, check the number that corresponds to the correct location.

Location 1:		
Location 2:		
Location 2.		
Location 3:		
Location 4:		
Location 1.		
Location 5:		
Location 5.		
Location 6:		



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Will	Location #:
Durable Power of Attorney	Location #:
Health-Care Directives	Location #:
Trust Agreements	Location #:
Birth Certificate	Location #:
Social Security Card	Location #:
Marriage Certificate	Location #:
Military Papers	Location #:
Adoption Papers	Location #:
Divorce/Separation Papers	Location #:
Vehicle Titles	Location #:
Deeds	Location #:
Safe-Deposit Box/Keys	Location #:
Bank Account Records (e.g., checking and savings account)	Location #:
Tax Returns	Location #:
Mortgage and Loan Papers	Location #:
Insurance Policies - Home and Auto	Location #:
Insurance Policies - Property and Casualty	Location #:
Insurance Policies - Life	Location #:
Insurance Policies - Health	Location #:
Business Papers (e.g., incorporation papers, trademarks)	Location #:
Retirement Account Papers (e.g., IRAs, annuities)	Location #:
Investment Papers (e.g., securities, stocks, bonds, mutual funds)	Location #:
Proof of Citizenship	Location #:
Important Keys	Location #:
Antiques and Heirlooms	Location #:
Jewelry	Location #:
Cash	Location #:
Funeral Instructions (e.g., cemetery plot deed, burial instructions)	Location #:
Passport	Location #:
Other	Location #:
Other	Location #:
Notes:	

