

DOCUMENT LOCATOR

This record should be kept in an easily accessible place. Therefore, do not include here any sensitive information, such as bank account numbers, but just the location of such information.

IDENTITY DOCUMENTS

DOCUMENT	LOCATION	NOTES	REVIEW DATE
Birth Certificate			
Baptismal Certificate			
Confirmation Certificate			
Citizenship Papers			
Marriage Certificate			
Premarital Agreement			
Divorce/Separation			
Adoption Papers			
Social Security Card			
Passport			
Educational Records			
Military/Veteran Records			
Employment Records			
Medical Records			
Health Insurance Records			
Safe Deposit Box #		key location:	
Personal Safe		location of key or combination	
Hiding places			
Other			

ASSET-RELATED DOCUMENTS

DOCUMENT	LOCATION	NOTES	REVIEW DATE
Real Estate			
deeds, trusts, home improvement records, etc.			
Banking			
acct. #s, bank books, CDs, current statements, etc.			
Investments			
stocks, mutual funds, bonds, annuities, savings bonds, etc.			
Retirement Accts.			
pensions, IRAs, 401-Ks, etc.			
Employee Benefit Info.			
Vehicle Papers			
Personal Property			
Other			

Last updated on _____

LIABILITY-RELATED DOCUMENTS

DOCUMENT	LOCATION	NOTES	REVIEW DATE
Loan Information			
lines of credit, outstanding loans, etc.			
Mortgage Statements			
Credit Card Information			
Bank Debit Information			
Outstanding bills			
Bankruptcy Discharge			
Other			

OTHER IMPORTANT DOCUMENTS

DOCUMENT	LOCATION	NOTES	REVIEW DATE
“A Parting Gift” notebook			
Tax Information			
Current			
Past returns			
Insurance Policies			
Life			
Household			
Vehicle			
Health			
Estate Planning			
Will			
Trust(s)			
Financial POA			
Health care POA			
Living Will			
Organ Donor Card			
Memorandum of Distribution of Personal Effects			
Funeral Documents			
Personal Burial Plan			
Important Contacts			
Memoir or Family History			
E-mail accounts/passwords			
Other			

HOUSEHOLD OPERATION

Who has keys to the house?

Name: _____ Phone Number: _____

Name: _____ Phone Number: _____

Name: _____ Phone Number: _____

I have / do not have an outside hidden key: Location? _____

Garage Door Code: _____ Alarm Code: _____

I keep my spare keys _____

Lock Combinations: _____

Childcare arrangements: _____

Person with signed emergency care authorization forms: _____

Houseplant and pet care. _____

I do / do not keep spare cash or important papers in obscure locations in the house.

Check the following: Bookcase _____ Freezer _____ Other _____

Location of water shut-off _____

Location of electrical panel _____

Home Owners Association Information: _____

Parking regulations and restrictions in my neighborhood: _____

Last updated on _____

These people have trusted me with keys. They need to be returned. _____

Information for trash removal service (when is trash night?) _____

I get deliveries (Newspaper? Food?) from _____

I have records of home improvement: **YES / NO**

Location _____

Contractors involved in property improvements

Name _____ Phone number _____

Contractors involved in property improvements

Name _____ Phone number _____

Contractors involved in property improvements

Name _____ Phone number _____

Location of warranties, receipts, instruction manuals, etc. _____

These are the keys on my key ring: _____

Other notes about my neighbors and neighborhood: _____

Last updated on _____