

# Document locator

INVESTOR NAME:

SSN:

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LAST UPDATED:

SPOUSE NAME:

SSN:

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LAST UPDATED:

**Plan indicate the location of the following items:**

**PERSONAL DOCUMENTS**

Original will or living trust docs (self) dated	<input type="checkbox"/>	N/A	LOCATION:
Original will or living trust docs (spouse/ partner) dated	<input type="checkbox"/>	N/A	LOCATION:
Special Estate Instructions – Written	<input type="checkbox"/>	N/A	LOCATION:
Special Estate Instructions – Video	<input type="checkbox"/>	N/A	LOCATION:
Trust Documents	<input type="checkbox"/>	N/A	LOCATION:
Power of Attorney	<input type="checkbox"/>	N/A	LOCATION:
Health Care Power of Attorney	<input type="checkbox"/>	N/A	LOCATION:
Living Will	<input type="checkbox"/>	N/A	LOCATION:
Birth Certificate / Copy of Passport	<input type="checkbox"/>	N/A	LOCATION:
Military Records	<input type="checkbox"/>	N/A	LOCATION:
Marriage Certificate	<input type="checkbox"/>	N/A	LOCATION:
Citizenship Papers	<input type="checkbox"/>	N/A	LOCATION:
Marriage Agreements (pre- or post-nuptial)	<input type="checkbox"/>	N/A	LOCATION:
Divorce Papers	<input type="checkbox"/>	N/A	LOCATION:
Funeral Arrangements	<input type="checkbox"/>	N/A	LOCATION:
Other, e.g., Adoption Papers	<input type="checkbox"/>	N/A	LOCATION:

**BUSINESS DOCUMENTS**

Partnership/LLC Documents  N/A LOCATION:

Corporate Documents  N/A LOCATION:

Inventory of Business Assets  N/A LOCATION:

Buy Sell Documents  N/A LOCATION:

Pension Plans  N/A LOCATION:

Other Emp. Retirement Benefits (e.g., Nonqualified Deferred Comp.)  N/A LOCATION:

**TAX RETURNS AND RECORDS**

Income Tax Returns (last 3 years)  N/A LOCATION:

Records Re: Tax Basis of Property  N/A LOCATION:

Gift Tax Returns  N/A LOCATION:

**INSURANCE POLICIES**

Health / Medical  N/A LOCATION:

Life Insurance – Individual(s)  N/A LOCATION:

Life Insurance – Group  N/A LOCATION:

Long Term Care  N/A LOCATION:

Property/Casualty  N/A LOCATION:

Umbrella Liability  N/A LOCATION:

Disability  N/A LOCATION:

Annuities  N/A LOCATION:

**FINANCIAL PAPERS**

Banking Accounts  N/A LOCATION:

Credit Card Accounts  N/A LOCATION:

Mortgage/Leases  N/A LOCATION:

Retirement Plans (IRAs, 401(k))  N/A LOCATION:

Investment Accounts  N/A LOCATION:

Other Investment Accounts  N/A LOCATION:

Donor Advised Fund  N/A LOCATION: SUCCESSOR:

Equity Comp. (stock options, restricted stock)  N/A LOCATION:

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**PROPERTY PAPERS**

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Combination to Personal Safe  N/A LOCATION:

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Bank Safe Deposit Box  N/A LOCATION:

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Vehicle Titles  N/A LOCATION:

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Original Deeds to Real Property  N/A LOCATION:

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Affidavits Re: Domicile  N/A LOCATION:

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Affidavits Re: Community Property  N/A LOCATION:

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Affidavits Re: Separate Property  N/A LOCATION:

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**PROFESSIONAL RESOURCES**

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FINANCIAL ADVISOR NAME: PHONE: EMAIL:

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INSURANCE AGENT NAME: PHONE: EMAIL:

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TAX PREPARER NAME: PHONE: EMAIL:

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ATTORNEY NAME: PHONE: EMAIL:

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PRIMARY PHYSICIAN NAME: PHONE: EMAIL:

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CLERGY NAME: PHONE: EMAIL:

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