

Document locator

INVESTOR NAME:

SSN:

LAST UPDATED:

SPOUSE NAME:

SSN:

LAST UPDATED:

Plan indicate the location of the following items:

PERSONAL DOCUMENTS

Key(s) to the safe deposit box	☐ YES	☐ NO	☐ N/A	LOCATION:
Original will or living trust docs (self) dated	☐ YES	☐ NO	☐ N/A	LOCATION:
Original will or living trust docs (spouse/ partner) dated	☐ YES	☐ NO	☐ N/A	LOCATION:
Special Estate Instructions – Written	☐ YES	☐ NO	☐ N/A	LOCATION:
Special Estate Instructions – Video	☐ YES	☐ NO	☐ N/A	LOCATION:
Trust Documents	☐ YES	☐ NO	☐ N/A	LOCATION:
Power of Attorney	☐ YES	☐ NO	☐ N/A	LOCATION:
Health Care Power of Attorney	☐ YES	☐ NO	☐ N/A	LOCATION:
Living Will	☐ YES	☐ NO	☐ N/A	LOCATION:
Birth Certificate / Copy of Passport	☐ YES	☐ NO	☐ N/A	LOCATION:
Military Records	☐ YES	☐ NO	☐ N/A	LOCATION:
Marriage Certificate	☐ YES	☐ NO	☐ N/A	LOCATION:
Citizenship Papers	☐ YES	☐ NO	☐ N/A	LOCATION:
Marriage Agreements (pre- or post-nuptial)	☐ YES	☐ NO	☐ N/A	LOCATION:
Divorce Papers	☐ YES	☐ NO	☐ N/A	LOCATION:
Funeral Arrangements	☐ YES	☐ NO	☐ N/A	LOCATION:
Other, e.g., Adoption Papers	☐ YES	☐ NO	☐ N/A	LOCATION:
Password program or documentation	☐ YES	☐ NO	☐ N/A	LOCATION:
Social networks	☐ YES	☐ NO	☐ N/A	LOCATION:
Mobile phone number(s)	☐ YES	☐ NO	☐ N/A	LOCATION:

BUSINESS DOCUMENTS

Partnership/LLC Documents	☐ YES	☐ NO	☐ N/A	LOCATION:
---------------------------	------------------------------	-----------------------------	------------------------------	-----------

Corporate Documents	☐ YES	☐ NO	☐ N/A	LOCATION:
---------------------	------------------------------	-----------------------------	------------------------------	-----------

Inventory of Business Assets	☐ YES	☐ NO	☐ N/A	LOCATION:
------------------------------	------------------------------	-----------------------------	------------------------------	-----------

Buy Sell Documents	☐ YES	☐ NO	☐ N/A	LOCATION:
--------------------	------------------------------	-----------------------------	------------------------------	-----------

Pension Plans	☐ YES	☐ NO	☐ N/A	LOCATION:
---------------	------------------------------	-----------------------------	------------------------------	-----------

Other Emp. Retirement Benefits (e.g., Nonqualified Deferred Comp.)	☐ YES	☐ NO	☐ N/A	LOCATION:
---	------------------------------	-----------------------------	------------------------------	-----------

TAX RETURNS AND RECORDS

Income Tax Returns (last 3 years)	☐ YES	☐ NO	☐ N/A	LOCATION:
-----------------------------------	------------------------------	-----------------------------	------------------------------	-----------

Records Re: Tax Basis of Property	☐ YES	☐ NO	☐ N/A	LOCATION:
-----------------------------------	------------------------------	-----------------------------	------------------------------	-----------

Gift Tax Returns	☐ YES	☐ NO	☐ N/A	LOCATION:
------------------	------------------------------	-----------------------------	------------------------------	-----------

INSURANCE POLICIES

Health / Medical	☐ YES	☐ NO	☐ N/A	LOCATION:
------------------	------------------------------	-----------------------------	------------------------------	-----------

Life Insurance – Individual(s)	☐ YES	☐ NO	☐ N/A	LOCATION:
--------------------------------	------------------------------	-----------------------------	------------------------------	-----------

Life Insurance – Group	☐ YES	☐ NO	☐ N/A	LOCATION:
------------------------	------------------------------	-----------------------------	------------------------------	-----------

Long Term Care	☐ YES	☐ NO	☐ N/A	LOCATION:
----------------	------------------------------	-----------------------------	------------------------------	-----------

Property/Casualty	☐ YES	☐ NO	☐ N/A	LOCATION:
-------------------	------------------------------	-----------------------------	------------------------------	-----------

Umbrella Liability	☐ YES	☐ NO	☐ N/A	LOCATION:
--------------------	------------------------------	-----------------------------	------------------------------	-----------

Disability	☐ YES	☐ NO	☐ N/A	LOCATION:
------------	------------------------------	-----------------------------	------------------------------	-----------

Annuities	☐ YES	☐ NO	☐ N/A	LOCATION:
-----------	------------------------------	-----------------------------	------------------------------	-----------

FINANCIAL PAPERS

Home Equity Line of Credit	☐ YES	☐ NO	☐ N/A	LOCATION:
----------------------------	------------------------------	-----------------------------	------------------------------	-----------

Banking Accounts	☐ YES	☐ NO	☐ N/A	LOCATION:
------------------	------------------------------	-----------------------------	------------------------------	-----------

Credit Card Accounts	☐ YES	☐ NO	☐ N/A	LOCATION:
----------------------	------------------------------	-----------------------------	------------------------------	-----------

Mortgage/Leases	☐ YES	☐ NO	☐ N/A	LOCATION:
-----------------	------------------------------	-----------------------------	------------------------------	-----------

Retirement Plans (IRAs, 401(k))	☐ YES	☐ NO	☐ N/A	LOCATION:
---------------------------------	------------------------------	-----------------------------	------------------------------	-----------

Investment Accounts	☐ YES	☐ NO	☐ N/A	LOCATION:
---------------------	------------------------------	-----------------------------	------------------------------	-----------

Other Investment Accounts	☐ YES	☐ NO	☐ N/A	LOCATION:	SUCCESSOR:
---------------------------	------------------------------	-----------------------------	------------------------------	-----------	------------

Donor Advised Fund	☐ YES	☐ NO	☐ N/A	LOCATION:
--------------------	------------------------------	-----------------------------	------------------------------	-----------

Equity Comp. (stock options, restricted stock)	☐ YES	☐ NO	☐ N/A	LOCATION:
---	------------------------------	-----------------------------	------------------------------	-----------

Other - Loans or obligations	☐ YES	☐ NO	☐ N/A	LOCATION:
------------------------------	------------------------------	-----------------------------	------------------------------	-----------

PROPERTY PAPERS

Mortgage(s)	☐ YES	☐ NO	☐ N/A	LOCATION:
Combination to Personal Safe	☐ YES	☐ NO	☐ N/A	LOCATION:
Bank Safe Deposit Box	☐ YES	☐ NO	☐ N/A	LOCATION:
Vehicle Titles	☐ YES	☐ NO	☐ N/A	LOCATION:
Original Deeds to Real Property	☐ YES	☐ NO	☐ N/A	LOCATION:
Affidavits Re: Domicile	☐ YES	☐ NO	☐ N/A	LOCATION:
Affidavits Re: Community Property	☐ YES	☐ NO	☐ N/A	LOCATION:
Affidavits Re: Separate Property	☐ YES	☐ NO	☐ N/A	LOCATION:

PROFESSIONAL RESOURCES

FINANCIAL ADVISOR	NAME:
	PHONE: EMAIL:
INSURANCE AGENT	NAME:
	PHONE: EMAIL:
ACCOUNTANT	NAME:
	PHONE: EMAIL:
TAX PREPARER	NAME:
	PHONE: EMAIL:
ATTORNEY	NAME:
	PHONE: EMAIL:
PRIMARY PHYSICIAN	NAME:
	PHONE: EMAIL:
CLERGY	NAME:
	PHONE: EMAIL:

Mesirow Wealth Management is a division of Mesirow financial Investment Management, Inc., and SEC-registered investment advisor. Mesirow refers to Mesirow Financial Holdings, Inc. and its divisions, subsidiaries and affiliates. The Mesirow name and logo are registered service marks of Mesirow Financial Holdings, Inc., © 2026, Mesirow Financial Holdings, Inc. All rights reserved.