

LOCATION OF VALUABLE PAPERS

My assets and valuables are stored in these locations:

- (A) Residence located at: _____
- (B) Safe Deposit Box at: _____ # _____
- © Office located at: _____
- _____
- (D) _____
- (E) _____
- (F) _____

	ITEM	LOCATION	COMMENTS
		A B C D E F	
1.	My will (original).....	() () () () () ()	_____
2.	My will (copy).....	() () () () () ()	_____
3.	Powers of Attorney.....	() () () () () ()	_____
4.	Original Trust Documents	() () () () () ()	_____
4.	My burial instructions.....	() () () () () ()	_____
5.	Cemetery plot deed.....	() () () () () ()	_____
6.	Spouse's will (original).....	() () () () () ()	_____
7.	Spouse's will (copy).....	() () () () () ()	_____
8.	Spouse's burial instructions.....	() () () () () ()	_____
9.	Document appointing kids' guardian.....	() () () () () ()	_____
10.	Handwritten list of special bequests.....	() () () () () ()	_____
11.	Safe combination, business.....	() () () () () ()	_____
12.	Safe combination, home.....	() () () () () ()	_____
13.	Trust agreements.....	() () () () () ()	_____
14.	Life insurance, group.....	() () () () () ()	_____
15.	Life insurance, individual.....	() () () () () ()	_____
16.	Other death benefits.....	() () () () () ()	_____

- 17. Property and casualty insurance..... () () () () () () _____
- 18. Health insurance policy..... () () () () () () _____
- 19. Homeowners insurance policy..... () () () () () () _____
- 20. Car insurance policy..... () () () () () () _____
- 21. Employment contracts..... () () () () () () _____
- 22. Partnership agreements..... () () () () () () _____
- 23. List of checking & savings accounts..... () () () () () () _____
- 24. Bank statements, canceled checks..... () () () () () () _____
- 25. List of credit cards..... () () () () () () _____
- 26. Certificates of deposit..... () () () () () () _____
- 27. Checkbooks and account records () () () () () () _____
- 28. Savings passbooks and account records..... () () () () () () _____
- 29. Record of investment securities..... () () () () () () _____
- 30. Brokerage account records..... () () () () () () _____
- 31. Stock certificates..... () () () () () () _____
- 32. Mutual Fund Basis Documents
- 33. Jewelry
- 34. Social Security Card (original)
- 35. Passports
- 36. Tax Returns & Supporting Documents
- 37. Hard Assets (Gold, Silver, Coins, Etc.
- 33. Bonds.....
- 34. Other securities.....
- 35. Corporate retirement plan.....
- IRA plan documents.....
- 37. Annuity contracts.....
- 38. Stock-option plan documents.....
- 39. Stock-purchase plan documents.....
- 40. 401K plan documents
- Retirement plan documents.....
- 41. Income and gift tax returns.....
- 42. Titles and deeds to real estate and land.....
- 43. Title insurance documents.....
- 44. Rental property records.....
- 45. Notes and other loan agreements, including mortgages.....
- 46. List of stored and loaned valuable possessions.....

47. Auto ownership records.....
48. Boat ownership records
Aircraft ownership records.....
49. Birth certificate.....
50. Citizenship papers.....
51. My adoption papers.....
52. Military discharge papers.....
53. Marriage certificate.....
54. Children's birth certificates.....
55. Children's adoption papers.....
56. Divorce/separation records.....
57. Names and addresses of relatives/ friends.....
58. Listing of professional & fraternal organization memberships.....
59. Genealogical records journal.....
60. Fire Box
61. Personal safe

IMPORTANT NAMES, ADDRESSES AND PHONE NUMBERS

Attorney

Accountant

Stockbroker

Insurance agent

Physician