

# Personal Document Locator

## Personal Information

Name \_\_\_\_\_

Social Security Number \_\_\_\_\_ Date of Birth \_\_\_\_\_

Name \_\_\_\_\_

Social Security Number \_\_\_\_\_ Date of Birth \_\_\_\_\_

Residence Address \_\_\_\_\_

Work Address \_\_\_\_\_

Safe Deposit Box: Number: \_\_\_\_\_ Bank: \_\_\_\_\_

Address: \_\_\_\_\_

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## Where are the legal documents?

Birth Certificate \_\_\_\_\_

Marriage Certificate \_\_\_\_\_

Baptismal Certificate \_\_\_\_\_

Medical Records \_\_\_\_\_

Burial Records \_\_\_\_\_

Letters of Last Instruction \_\_\_\_\_

Divorce Papers \_\_\_\_\_

Social Security Cards \_\_\_\_\_

## PERSONAL DOCUMENT LOCATOR (CONTINUED)

## Where are the Legal Documents (continued)?

Powers of Attorney	_____
Will and Trust Agreements	_____
Veterans' Papers	_____
Living Will	_____
Other	_____
Other	_____

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## Where are the Financial Documents?

Mortgage Papers	_____
Bank Account Books/Papers	_____
Brokerage Firm Papers	_____
Stock and Bond Certificates	_____
Income Tax Returns	_____
Gift Tax Returns	_____
Employee Benefit Data	_____
Other	_____
Other	_____

## PERSONAL DOCUMENT LOCATOR (CONTINUED)

## Where are the Insurance Policies?

Life	_____
Life	_____
Disability	_____
Health/Medical	_____
Long-term Health Care	_____
Homeowner's/Renter's	_____
Auto	_____
Other	_____

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## Where are the Titles and Deeds?

Automobile	_____
House	_____
Other Real Estate	_____
Cemetery Plot	_____
Other	_____
Other	_____

# Personal Resources

## Important People

### Financial Planner

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

### Attorney

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

### Banker

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

### Employer

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

### Accountant

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

### Other

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

## PERSONAL RESOURCES (CONTINUED)

**Institutions****Bank**

Bank Name: \_\_\_\_\_

Bank Address: \_\_\_\_\_

Account Type &amp; Number: \_\_\_\_\_

Account Type &amp; Number: \_\_\_\_\_

Account Type &amp; Number: \_\_\_\_\_

**Bank**

Bank Name: \_\_\_\_\_

Bank Address: \_\_\_\_\_

Account Type &amp; Number: \_\_\_\_\_

Account Type &amp; Number: \_\_\_\_\_

Account Type &amp; Number: \_\_\_\_\_

**Money Market**

Financial Institution \_\_\_\_\_

Address: \_\_\_\_\_

Account Number: \_\_\_\_\_

**Savings**

Financial Institution: \_\_\_\_\_

Address: \_\_\_\_\_

Account Number: \_\_\_\_\_

**Credit Union:**

Financial Institution \_\_\_\_\_

Address: \_\_\_\_\_

Account Number: \_\_\_\_\_

**Other**

Financial Institution: \_\_\_\_\_

Address: \_\_\_\_\_

Account Number: \_\_\_\_\_

## PERSONAL RESOURCES (CONTINUED)

## Insurance Policies

<b>Life</b>	Company & Agent:	_____
	Address:	_____
	Account Number:	_____
<b>Health</b>	Company & Agent:	_____
	Address:	_____
	Account Number:	_____
<b>Disability</b>	Company & Agent:	_____
	Address:	_____
	Account Number:	_____
<b>Long-term Care</b>	Company & Agent:	_____
	Address:	_____
	Account Number:	_____
<b>Home Owners</b>	Company & Agent:	_____
	Address:	_____
	Account Number:	_____
<b>Auto</b>	Company & Agent:	_____
	Address:	_____
	Account Number:	_____

## PERSONAL RESOURCES (CONTINUED)

**Insurance Policies**

**Other**                      Company & Agent: \_\_\_\_\_  
                                    Address: \_\_\_\_\_  
                                    Account Number: \_\_\_\_\_

**Other**                      Company & Agent: \_\_\_\_\_  
                                    Address: \_\_\_\_\_  
                                    Account Number: \_\_\_\_\_

**Other**                      Company & Agent: \_\_\_\_\_  
                                    Address: \_\_\_\_\_  
                                    Account Number: \_\_\_\_\_

**Other**                      Company & Agent: \_\_\_\_\_  
                                    Address: \_\_\_\_\_  
                                    Account Number: \_\_\_\_\_

**Other**                      Company & Agent: \_\_\_\_\_  
                                    Address: \_\_\_\_\_  
                                    Account Number: \_\_\_\_\_

## PERSONAL RESOURCES (CONTINUED)

## Digital and Social Media Accounts

**Primary Email**

Address: \_\_\_\_\_

Password: \_\_\_\_\_

**Other Email**

Address: \_\_\_\_\_

Password: \_\_\_\_\_

**Facebook**

Username/Email: \_\_\_\_\_

Password: \_\_\_\_\_

**LinkedIn**

Username/Email: \_\_\_\_\_

Password: \_\_\_\_\_

**Twitter**

Username/Email: \_\_\_\_\_

Password: \_\_\_\_\_

**Other**

Account: \_\_\_\_\_

Username/Email: \_\_\_\_\_

Password: \_\_\_\_\_

**Other**

Account: \_\_\_\_\_

Username/Email: \_\_\_\_\_

Password: \_\_\_\_\_