



LEGAL AND FINANCIAL DOCUMENT LOCATOR

Lawyer _____ Phone _____
Accountant/Tax Prep _____ Phone _____
Other _____ Phone _____

| Item | Account Information, etc | Location |
|--------------------------------|--------------------------|----------|
| Safety Deposit Box: Bank _____ | Box# _____ Keys _____ | |
| Birth Certificate | | |
| Passport | | |
| Marriage/Divorce Records | | |
| Will | | |
| Spousal Death Certificate | | |
| Power of Attorney | | |
| Advance Medical Directive | | |
| Checking Account | | |
| Savings Account | | |
| Credit Card | | |
| Credit Card | | |
| Property Deed(s) | | |
| Mortgage or Rental Lease | | |
| Life Insurance | | |
| Property Insurance | | |
| Appraisals/Inventory Lists | | |
| Loan agreements | | |
| Income Tax Records | | |
| Property Tax Records | | |
| 401K Plans | | |
| Pensions/IRAs | | |
| Military Records | | |
| Social Security Information | | |
| Auto Title(s) | | |
| Auto Insurance Card | | |
| Driver's License | | |
| Car Registration/Inspection | | |
| Online Account www. _____ | Password _____ | |
| Online Account www. _____ | Password _____ | |

Location Key:

A _____ B _____
C _____ D _____