



DOCUMENT LOCATOR

Date	
Name	
Address	

Document	Location (Home, Office, Attorney, etc.)
Burial/Funeral Instructions	
Will/Codicil	
Trust Agreements	
Power of Attorney	
Health Care Proxy	
Living Will	
Safe Deposit Box (Bank and Key)	
Tangible Property Bequest List	
Life Insurance Policies	
IRA/Plan Beneficiary Designations	
Other Death Benefits Information	
Retirement Plan Information	
Bank Statements	
Brokerage Statements	
Mutual Funds Statements	
Other Financial Institution Statements	
Income Tax Returns	
Gift Tax Returns	
Deeds	
Mortgages	
Automobile Titles/Loans	
Cemetery Deeds	

OTHER INFORMATION

Document	Location
Birth Certificate	
Marriage Certificate	
Citizenship Papers	
Adoption Papers	
Children's Birth Certificates	
Divorce/Separation Papers	
Health Insurance/Medicare Information	
Non-life Insurance Policies	
List of Credit Cards	
Business Agreements	
Other	
Other	
Other	

Attorney Name	
Address	
Phone	
Fax	
Email	

Accountant Name	
Address	
Phone	
Fax	
Email	

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