

Location of Records

Name: _____

Social Security Number: _____

Legal Residence: _____

Doctor, Address & Phone Number: _____

Attorney, Address & Phone Number: _____

C.P.A., Address & Phone Number: _____

Insurance Agent, Address & Phone Number: _____

Stockbroker, Address & Phone Number: _____

**Banker, Address & Phone
Number:** _____

**Safe Deposit Box
Location:** _____

Will located at: _____

Living Will located at: _____

**Durable Power of
Attorney located at:** _____

**Power of Attorney
located at:** _____

**Trust Agreements
located at:** _____

**Citizenship Papers
located at:** _____

Divorce records located at: _____

Marriage License located at: _____

Military records located at: _____

Pension and Retirement Accounts located at: _____

Life Insurance Policy located at: _____

Health Insurance Policy located at: _____

Disability Insurance Policy located at: _____

Long Term Health Care Policy located at: _____

Real Estate Deeds located at: _____

Mortgage papers located at: _____

Rental Agreements located at: _____

Employer, Address & Phone Number: _____

Burial Papers located at: _____

Religious membership at: _____

Birth Certificate located at: _____

Passport Located at: _____

Other: _____

The above list is designed to assist you in putting your records in order. It is not designed to be all inclusive and should be adjusted for your individual needs.

This list is provided to you by:

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