

Name: \_\_\_\_\_  
 Social Security #: \_\_\_\_\_  
 Spouse/Partner's Name: \_\_\_\_\_  
 Social Security #: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Date Prepared: \_\_\_\_\_  
 Copies given to: \_\_\_\_\_

My valuable papers are stored in these locations (address & where to look)

A: Residence \_\_\_\_\_  
 B: Safe Deposit Box \_\_\_\_\_  
 C: Other \_\_\_\_\_

Item	A	B	C
My Will (original)			
Power of attorney--healthcare			
Power of attorney--finance			
Spouse's/Partner's Will (original)			
Safe combination			
Trust agreement			
Life insurance policy			
Health insurance policy			
Homeowners policy			
Car insurance policy			
Employment contracts			
Partnership agreements			
List of checking, saving accounts			
List of credit cards			
Retirement papers			
Deferred compensation; IRA			
Funeral arrangements			
Titles & deeds			
Notes (mortgages)			
List of stored & loaned items			
Auto ownership records			
Birth Certificate			
Military/veterans papers			
Marriage certificate			
Children's birth certificates			
Divorce/separation records			
Other			
Other			

	Name	Phone #
Emergency Contact:		
Doctor		
Doctor		
Clergy		
Attorney		
Accountant		
Insurance Agent		
Stock Broker		