

**LOCATION OF IMPORTANT ITEMS**

**NAME:** \_\_\_\_\_

**DATE COMPLETED:** \_\_\_\_\_

These instructions are being provided to assist my family members and duly appointed legal representatives with my personal and financial affairs. I provide these instructions to inform my representatives regarding the location of my personal and financial information. **This information should not be stored digitally but should be stored in a LOCKED and secure location.**

[ ] **Important Papers are Filed/Stored:**

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

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

Deeds: \_\_\_\_\_

Social Security Info.: \_\_\_\_\_

Powers of Attorney: \_\_\_\_\_

Medical Information: \_\_\_\_\_

Military Records: \_\_\_\_\_

Citizenship Papers: \_\_\_\_\_

Life Insurance Policies: \_\_\_\_\_

[ ] **Safe Deposit Box Information:**

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

Branch: \_\_\_\_\_

Key is Kept: \_\_\_\_\_

People with Access: \_\_\_\_\_

Contents of Box:

Original Will

Deed or Contract for Cemetery Plot

Insurance Policies

Legal Documents

Asset Information

Other Valuables

[ ] **Vehicles:**

Titles to any motor vehicle, (truck, motorcycle, boat, motor home,) trailer or others may be located at:

\_\_\_\_\_

\_\_\_\_\_

[ ] **Valuables - Antiques, Jewelry, Art, Guns, Tools, & Other Collections:**

Appraisals, insurance policies, and a description of art, antiques, guns, tools, and jewelry are located:

Description

Location

Appraisal

Insurance

**Valuables - Antiques, Jewelry, Art, Guns, Tools, & Other Collections (continued):**

The information contained herein is extremely confidential and unauthorized access could subject me and my assets to significant risk. This form should be secured by lock and key, preferably in a safe deposit box. This form should not be stored electronically where security could be breached.

**LOCATION OF IMPORTANT ITEMS**

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[ ] **Keys and Alarm Codes:**

Keys, alarm codes or combinations to my home, business, and vehicles are located:

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[ ] **Important People Who May Be Helpful to You:**

The following professionals have assisted me with legal or financial matters and can provide you with assistance. However, please do not rush to close any accounts, transfer or roll over accounts, or claim any benefits until you have obtained appropriate advice regarding any post-mortem tax planning that could be affected by your actions:

<u>Name</u>	<u>Phone Number</u>	<u>Relationship</u>
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**Personal, Business, Loans, or Other Credit Obligations:**

My debts and related information:

<u>Lender/Creditor</u>	<u>Address</u>	<u>Type of Credit</u>	<u>Collateral</u>	<u>Balance</u>
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**Debts Owed to Me:**

Debts owed to me, identity of the debtor, amount owed, collateral, and repayment terms are:

<u>Debtor</u>	<u>Address</u>	<u>Amount Owed</u>	<u>Collateral</u>	<u>Repayment Terms</u>
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**Miscellaneous:**

Business interests, other investments, other instructions or information for my family members and Personal Representative:

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Signed this \_\_\_ day of \_\_\_\_\_, 200\_\_\_, X\_\_\_\_\_

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