



Where Are My Important Papers?

Name:	
DOB:	Social Security #:
Medicare #:	Health Plan ID #:
Prescription Plan:	Veterans ID #:
Other Important ID/ #s:	

My important papers are stored in the following locations:

For example—safety deposit box, bottom desk drawer, safe.

Location A:
Location B:
Location C:
Location D:

ITEM	LOCATION			
	A	B	C	D
My will (original)				
My will (copy)				
Spouse's will (original)				
Spouse's will (copy)				
Power of Attorney				
Health Care Proxy				
Advance Directives				
Health Insurance				
Life Insurance Policy				
Homeowners Policy				
Mortgage/Deed/Lease				
Car Insurance Policy				
Car title				
Military Papers				
Doctors' Information				
Medical Records				
Safety deposit box keys				
List of Safety Deposit Box Contents				
Pension				

ITEM	LOCATION			
	A	B	C	D
IRA/401k Accounts				
List of Bank Accounts				
Certificates of Deposit				
List of Credit Cards				
Other Financial Accounts				
Annuities				
Stock Certificates				
Bonds/other Securities				
Income Tax Returns				
Birth Certificate				
Marriage Certificate				
Death Certificates				
Citizenship Papers				
Other Family Info				
Draft Obituary				
Funeral Directions				
Divorce Papers				
List of Passwords				
Other:				

IMPORTANT NAMES, ADDRESSES, PHONE NUMBERS & EMAILS:

Primary Doctor:

Other Doctors:

Family Members:

Attorney:

Accountant:

Executor of Estate:

Financial Advisor:

Insurance Agent:

Banks:

Location of safety deposit box:

Date Prepared: _____

Copies Given to:

Name: _____

Name: _____

Phone #: _____

Phone #: _____

Email: _____

Email: _____