

THE DOCUMENTS LOCATOR CHECKLIST

The Documents Locator

- Complete the Documents Locator
- Make copies of original documents
- Store original documents in safe place
- Maintain 24-hour access to original documents
- Back up Documents Locator information on a flash drive

Keep in safety-deposit box

- Stock certificates
- Securities and bonds
- Certificates of deposit
- Titles to property and vehicles
- Deeds
- Bills of Sale—Major purchases and valuables
- Appraisals of property and valuables
- Retirement bank account records
- Company pension records
- Contracts and legal agreements
- Naturalization papers

Duplicate these documents for family members your attorney

- Proof of Insurance
- Letters of Instruction
- Power of Attorney for property
- Power of Attorney for health care
- Living will
- The Documents Locator

Keep in fireproof box at home

- Birth certificates
- Death certificates
- Marriage licenses
- Divorce decrees
- Financial records
- Passports
- Insurance policies
- Wills
- Letters of Instruction
- Power of Attorney for property
- Power of Attorney for health care
- Military discharge papers
- Income tax returns for past six years
- Property tax receipts
- Warranties

