

THE DOCUMENTS LOCATOR

Name: _____

Today's Date: _____

Pin numbers / access codes

Bank by phone: _____

Bank online: _____

Debit cards: _____

Cash station: _____

Telephone voice mail: _____

Cell phone: _____

Personal Digital Assistant (PDA): _____

Property: _____

Computer & internet usage

Computer access Password: _____

Wireless security code: _____

E-mail address: _____

E-mail access code: _____

Important websites & Passwords: _____

Location of CD-ROMs & Flash Drive backup files: _____

Personal bank accounts

Account name and number: _____

Names on account: _____

Bank: _____

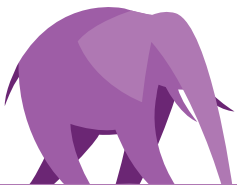
Telephone: _____

Type of account: _____

Location of account documents: _____

Second signature: _____

Power of Attorney: _____



Automatic bill paying

Name of store and service: _____

Contact name: _____

Telephone: _____

Date payment deducted: _____

Bank and account number: _____

Name of store/service: _____

Contact name: _____

Telephone: _____

Date payment deducted: _____

Bank and account #: _____

Electronic funds transfer account (eta)

Account name and number: _____

Names on account: _____

Bank: _____

Telephone: _____

Personal loan

Name(s) on loan: _____

Loan number: _____

Bank: _____

Telephone: _____

Type of loan: _____

Location of loan papers: _____

Outstanding lien against property

Name(s) on loan: _____

Loan number: _____

Bank: _____

Telephone: _____

Location of loan papers: _____



Paid liens against property

Name(s) on loan: _____

Loan number: _____

Bank: _____

Telephone: _____

Location of Proof of Payment papers: _____

Installment loan

Name(s) on loan: _____

Loan number: _____

Bank: _____

Telephone: _____

Location of loan papers: _____

Business bank account

Bank: _____

Telephone: _____

Location of account documents: _____

Business name on account: _____

Account number: _____

Type of account: _____

Second signature: _____

Power of Attorney: _____

Business loan

Name(s) on loan: _____

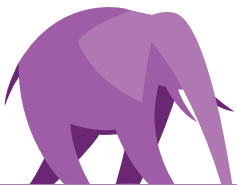
Loan number: _____

Type of loan: _____

Bank: _____

Telephone: _____

Location of loan papers: _____



Credit union

Union name: _____
Telephone: _____
Name on account(s): _____
Type of account(s): _____
Account number(s): _____
Location of documents: _____

Foreign bank account

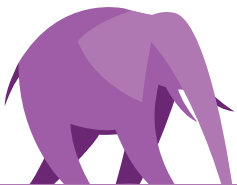
Name(s) on account: _____
Account number: _____
Type of account: _____
Bank: _____
Telephone: _____
Location of account papers: _____

Company pension

Name on pension: _____
Reference number: _____
Dates of employment: _____
Company name: _____
Telephone: _____
Location of pension papers: _____

Retirement account

Name on account: _____
Account reference number: _____
Type of account: _____
Bank: _____
Telephone: _____
Location of account documents: _____



Savings certificate

Depositor: _____
Certificate number: _____
Bank: _____
Telephone: _____
Location of certificates: _____

Savings bond

Bond held by: _____
Type of bond: _____
Bond series number: _____
Location of bond: _____

Stock certificate

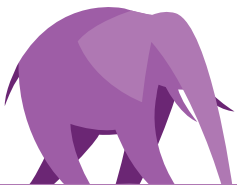
Stockholder(s): _____
Stock name: _____
Stock number: _____
Broker: _____
Telephone: _____
Location of stock documents: _____

Safe-deposit box

Box holder: _____
Has access to box: _____
Telephone number: _____
Box number: _____
Bank: _____
Telephone: _____
Key location: _____

Cash-on-hand

Location: _____



Home safe

Has access to safe: _____

Telephone: _____

Location of combination or key: _____

Business safe

People with access to safe: _____

Telephone: _____

Telephone: _____

Location of combination or key: _____

Will

Will of: _____

Attorney: _____

Telephone: _____

Location of original will papers: _____

People with copies of will papers: _____

Telephone: _____

Trust

Established by: _____

Trust for: _____

Attorney: _____

Telephone: _____

Location of original trust papers: _____

People with copies of trust papers: _____

Living will

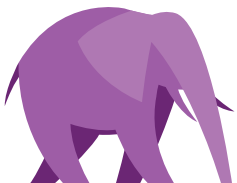
Will of: _____

Attorney: _____

Telephone: _____

Location of original living will: _____

People with copies of living will: _____



Telephone: _____

Power of attorney for property

Given to: _____

Telephone: _____

Attorney: _____

Telephone: _____

Location of original document: _____

People with copy of papers: _____

Power of attorney for health care

Location of original document: _____

People with copies of the document: _____

Agent: _____

Telephone: _____

Letters of instruction

Written by: _____

Location of original documents: _____

Telephone: _____

People with copy of documents: _____

Telephone: _____

Funeral instructions / memorial services

Arranged by: _____

Funeral home: _____

Telephone: _____

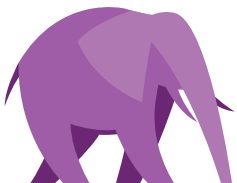
Location of instruction papers: _____

People with copies of instructions: _____

Telephone: _____

Donor arrangement

Location of documentation: _____



Autopsy permission

Location of documentation: _____

Social security

Social Security number: _____

Location of Social Security card: _____

Military discharge papers

Veteran name: _____

Service number: _____

Discharge papers location: _____

Income tax filings

Name of taxpayer: _____

Tax identification number: _____

Tax adviser: _____

Telephone: _____

Location of tax records: _____

Passport

Name on passport: _____

Passport number: _____

Location of passport: _____

Driver's license

Name on license: _____

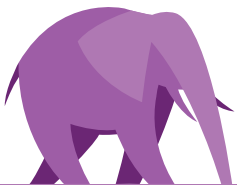
License number: _____

State license issued: _____

License renewal date: _____

Credit cards / charge accounts

Account name: _____



Account number: _____

Name on account: _____

Location of card: _____

Medicare

Name: _____

Number: _____

Effective date: _____

Medicaid

Name: _____

Number: _____

Effective date: _____

Healthcare insurance

Subscriber's name: _____

Contract number: _____

Group number: _____

Insurance company: _____

Telephone: _____

Long-term care insurance

Name on policy: _____

Policy number: _____

Insurance company: _____

Insurance agent: _____

Telephone: _____

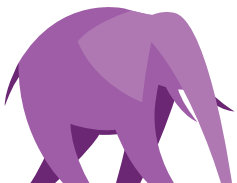
Location of policy: _____

Life insurance

Name on policy: _____

Policy number: _____

Insurance company: _____



Insurance agent: _____

Telephone: _____

Location of policy: _____

Annuity

Name on annuity: _____

Insurance company: _____

Contract number: _____

Location of papers: _____

Disability insurance

Name on policy: _____

Policy number: _____

Insurance company: _____

Insurance agent: _____

Telephone: _____

Location of policy: _____

Home Owner's insurance

Name on policy: _____

Policy number: _____

Insurance company: _____

Insurance agent: _____

Telephone: _____

Location of policy: _____

Real estate investment insurance

Name on policy: _____

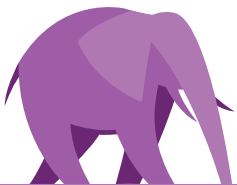
Policy number: _____

Insurance company: _____

Insurance agent: _____

Telephone: _____

Location of policy: _____



Renter's insurance

Name on policy: _____

Policy number: _____

Insurance company: _____

Insurance agent: _____

Telephone: _____

Location of policy: _____

Business insurance

Name on policy: _____

Policy number: _____

Insurance company: _____

Insurance agent: _____

Telephone: _____

Location of policy: _____

Liability insurance

Name on policy: _____

Policy number: _____

Insurance company: _____

Insurance agent: _____

Telephone: _____

Location of policy: _____

Vehicle insurance

Policy holder: _____

Vehicle insured: _____

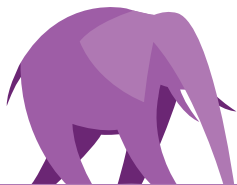
Vehicle registration number: _____

Insurance company: _____

Insurance agent: _____

Telephone: _____

Location of title: _____



Vehicle

Vehicle: _____
Make and model: _____
Serial number: _____
Where purchased: _____
Telephone: _____
Name on title: _____
Location of title papers: _____
Location of electronic toll collection system: _____

Valuables insurance

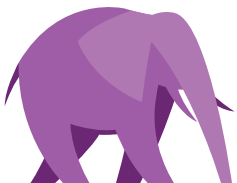
Policy holder: _____
Item insured: _____
Policy number: _____
Insurance company: _____
Insurance agent: _____
Telephone: _____
Location of policy: _____

Real estate ownership documents

Property address: _____
Owner: _____
Telephone: _____
Co-owner: _____
Telephone: _____
Bank or mortgage company: _____
Telephone: _____
Location of documents: _____

Cemetery plot

Owner: _____
Plot intended for: _____
Cemetery: _____



Plot location: _____

Telephone: _____

Location of plot deeds: _____

Subscriptions

Name of publication: _____

Sent to: _____

Name of publication: _____

Sent to: _____

Name of publication: _____

Sent to: _____

Club memberships

Organization: _____

Telephone: _____

Organization: _____

Telephone: _____

Membership / smart cards

Account name: _____

Account number: _____

Name on account: _____

Location of card: _____

Religious affiliation

Place of worship: _____

Address: _____

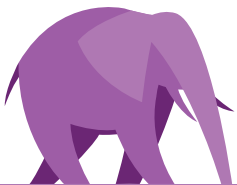
Clergy person: _____

Telephone: _____

Documentation of special Instructions: _____

Religious rites and ceremonies

Event: _____



Event date: _____
Place of event: _____
Records storage location: _____

Items in storage

Stored in name of: _____
What is being stored: _____
Storage company: _____
Telephone: _____
Location of storage documents: _____

Items—repaired/restored/cleaned

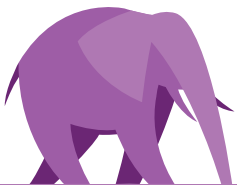
Item owner: _____
Item description: _____
Shop name: _____
Telephone: _____
Claim ticket location: _____

Items borrowed

Item description: _____
Lent to: _____
Telephone: _____

Items on order

Ordered for: _____
Item description: _____
Order reference number: _____
Shop name: _____
Telephone: _____
Expected order date: _____
Location of paperwork: _____



Personal contracts/agreements

Names on contract: _____

Telephone: _____

Nature of agreement: _____

Location of paperwork: _____

Medical history

History of: _____

Birth date: _____

Location of records: _____

Birth record

Name at birth: _____

Birth date: _____

Place of birth: _____

Birth certificate location: _____

Adoption papers

Adoption name: _____

Adopted by: _____

State of adoption: _____

Adoption agency: _____

Telephone: _____

Location of paperwork: _____

Naturalization papers

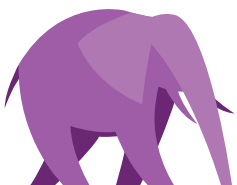
Citizen name: _____

Place of naturalization: _____

Location of papers: _____

Marriage license

Names on license: _____



Marriage date: _____

State license issued: _____

License location: _____

Divorce decree

Names on decree: _____

Divorce date: _____

State divorce granted: _____

Decree location: _____

School records

Student name: _____

School: _____

School location: _____

Telephone: _____

Dates attended: _____

Graduation date: _____

Diploma location: _____

Employment history

Employee name: _____

Dates of employment: _____

Company: _____

Company address: _____

Telephone: _____

Mother's history

Mother's name at birth: _____

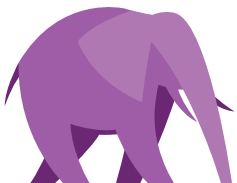
Date of birth: _____

Place of birth: _____

Birth certificate location: _____

Mother's name at death: _____

Cause of death: _____



Date of death: _____

Location of death: _____

Burial location: _____

Death certificate location: _____

Father's history

Father's name at birth: _____

Date of birth: _____

Place of birth: _____

Birth certificate location: _____

Father's name at death: _____

Cause of death: _____

Date of death: _____

Location of death: _____

Burial location: _____

Death certificate location: _____

Dependents

Name: _____

Date of birth: _____

Location of birth certificate: _____

Grown children/Independent Children

Name: _____

Date of birth: _____

Address: _____

City/State/Zip: _____

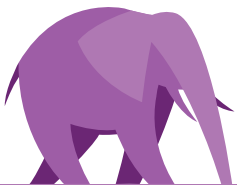
Telephone: _____

Pets

Name of pet: _____

Breed: _____

Date of birth: _____



Sex: _____

Animal hospital: _____

Telephone: _____

Breeder: _____

Is promised to: _____

Home Inventory (fixtures, furniture, equipment, appliances)

Item description: _____

Model number: _____

Purchase price: _____

Value of item today: _____

Location of receipt: _____

Location of warranty: _____

Location of item instructions: _____

Is promised to: _____

Personal Items Inventory (clothes, books, photos, mementos)

Item description: _____

Purchase price: _____

Value of item today: _____

Location of receipt: _____

Is promised to: _____

Valuables Inventory (collections, jewelry, artwork, antiques, etc)

Item description: _____

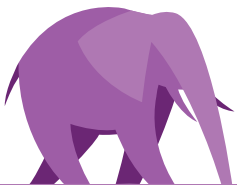
Serial number: _____

Purchase price: _____

Value of item today: _____

Location of receipt: _____

Is promised to: _____



Business Inventory (fixtures, furniture, equipment, appliances)

Item description: _____
Model number: _____
Purchase price: _____
Value of item today: _____
Location of receipt: _____
Location of warranty: _____
Location of item instructions: _____
Is promised to: _____

