

Location of Important Documents and Information for (Names) _____ Last Updated _____

Tips: If you have not documented any of this information before, do one page at a time to make it more manageable. If an item does not apply to you, mark it "NA" (not applicable). Keep this document in a safe place, such as a safe deposit box. For an electronic version in Microsoft Word format, visit www.vacu.org. If you save the completed document on your PC, make sure the document is secure.

Item	Location of Actual Document or Item	Name of Company or Contact Information	Policy or Account No.	Additional Notes/Beneficiary
Will/Trust documents		Name of executor/administrator/trustee		
Medical directives				
Durable power of attorney		Person you have given POA		
Birth certificates/passports				
Marriage license/ divorce papers				
Other legal documents				
Health records				
Deeds/real estate documents				
Vehicle/boat title(s) Descriptions				
Tax returns and records				
Safe deposit box	Location of keys	Financial institution name and branch		Box # Who has access
Funeral arrangements				
Cemetery lot deed				
Name of attorney/ tax preparer/accountant				
Insurance Policies:				

Item	Location of Actual Document or Item	Name of Company or Contact Information	Policy or Account No.	Additional Notes/Beneficiary
Life insurance				
Health insurance				
Auto insurance				
Homeowners insurance				
Other insurance				
<u>Credit Union/ Bank Accounts:</u>				
<u>Loans/Other Debts Owed:</u>				
Mortgage				
Vehicle loan				
Other loans/credit cards				
<u>Stocks/Bonds/ Mutual Funds:</u>				

Item	Location of Actual Document or Item	Name of Company or Contact Information	Policy or Account No.	Additional Notes/Beneficiary
<u>Retirement/IRAs/Deferred Compensation Plans:</u>				
<u>Other Assets of Value:</u>				