

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		Name of executor or administrator		
Medical directives				
Durable power of attorney		Person you have given POA		
Trust documents		Trustee/successor trustee name		
Deeds/real estate documents				Property addresses
Birth certificates				
Passports				
Marriage license				
Divorce/guardian/custodian papers				
Children's records/deferred tuition records				
Military papers				
Health records				
Vehicle/boat title(s)				
Tax returns and records				
Business agreements				
Safe deposit box	Location of keys	Financial institution name and branch		Box # Who has access

Item	Location of Actual Document or Item	Name of Company or Contact Information	Policy or Account No.	Additional Notes/Beneficiary
<u>Insurance Policies:</u>				
Primary health insurance papers				
Additional health or hospitalization insurance				
Medicare card				
Medicare supplement policy				
Long-term care policy				
Auto insurance policy				
Homeowners policy				
Life insurance policy				
Life insurance policy				
Accidental death and dismemberment policy				
Disability insurance policy				
Other insurance policy				
<u>Funeral/Burial:</u>				
Funeral arrangements				
Cemetery lot deed				
<u>Professional Services:</u>				
Name of attorney				
Other				

Item	Location of Actual Document or Item	Name of Company or Contact Information	Policy or Account No.	Additional Notes/Beneficiary
<u>Credit Union/ Bank Accounts:</u>				
Checking account				
Savings account				
Other accounts				
<u>Loans/Other Debts:</u>				
Mortgage				
Vehicle loan				
Other loans/credit cards				

Item	Location of Actual Document or Item	Name of Company or Contact Information	Policy or Account No.	Additional Notes/Beneficiary
<u>Investments:</u>				
U.S. Savings Bonds				
Stocks/bonds/mutual funds				
<u>Retirement/ IRAs/Deferred Compensation Plans:</u>				
Pension/retirement plan				
401(k) plan/other deferred compensation plan				
Profit sharing plan				
Individual Retirement Accounts				
<u>Other Assets of Value:</u>				