



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				
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

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Insurance Policies:				
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				
Funeral/Burial:				
Funeral arrangements				
Cemetery lot deed				
Professional Services:				
Name of attorney				
Other				

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Credit Union/ Bank Accounts:				
Checking account				
Savings account				
Other accounts				
Loans/Other Debts:				
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
Investments:				
U.S. Savings Bonds				
Stocks/bonds/mutual funds				
Retirement/ IRAs/Deferred Compensation Plans:				
Pension/retirement plan				
401(k) plan/other deferred compensation plan				
Profit sharing plan				
Individual Retirement Accounts				
Other Assets of Value:				