



Document Locator Checklist and Worksheets

1. Personal Documents

- Adoption Papers
- Birth Certificate
- Co-op Stock Certificate & Proprietary Lease
- Divorce Papers
- Driver's License
- Frequent Flyer
- Funeral Arrangements
- Health Care Proxy
- Health Insurance
- Insurance Policies
- Lease Agreements
- Living Will
- Loans & Notes (receivables & payable)
- Marriage Certificate
- Medicare Card
- Military Records
- Mortgage
- Naturalization Documents
- Passport
- Password Master List
- Pet-Related Papers
- Power(s) of Attorney
- Real Estate Deeds
- Social Security Card
- Trust Documents
- Vehicle Registration / Ownership Papers
- Will

2. Family Contact List

- Children
- Partner
- Close Relatives
- Other

3. Family Advisors

- Attorney
- Banker
- Broker
- Certified Public Accountant
- Clergy
- Financial Planner
- Insurance Agent

4. Tax Statements

- Current Tax Information
- Previous Years' Tax Returns
- Property Tax Statement
- Personal Property Tax (i.e., car tax)

5. Financial Accounts

- Bank: checking, savings, money market, certificates of deposit
- Brokerage
- Credit Cards / Debit Cards
- Partnerships / LLCs / S-Corps / Royalties
- Retirement Account / Pension Plan / Annuities
- Safe Deposit Box
- Savings Bonds / Stock Certificates
- Trust Accounts / UGMA or UTMA Accounts / 529 Plans

6. Education / Childcare / Eldercare

- Schools
- Daycare
- Caretaker / Home Attendant

7. Medical Specialists

- Dentist
- Doctors
- Pharmacy
- Prescriptions
- Veterinarian

1. Personal Documents

Personal Documents	Location	Notes
Adoption Papers		
Birth Certificate		
Co-op Stock & Proprietary Lease		
Divorce Papers		
Driver's License		
Frequent Flyer		
Funeral Arrangements		
Health Care Proxy		
Health Insurance		
Insurance Policies		
Lease Agreements		
Living Will		
Loans & Notes (receivables & payable)		
Marriage Certificate		
Medicare Card		
Military Records		
Mortgage		
Naturalization Papers		
Passport		
Password Master List		
Pet-Related Papers		
Power(s) of Attorney		
Real Estate Deeds		
Social Security Card		
Trust Documents		
Vehicle Registration / Ownership Papers		
Will		

2. Family Contact List (make multiple copies as needed)

Name	Relationship	
Home Address	Phone	Email
Work Name & Address	Phone	Email
Notes:		

Name	Relationship	
Home Address	Phone	Email
Work Name & Address	Phone	Email
Notes:		

3. Family Advisors (make multiple copies as needed)

Type of Advisor	
Contact Name	
Phone	Fax
Cell Phone	Email
Business Name & Address	
Website:	
Notes:	

Type of Advisor	
Contact Name	
Phone	Fax
Cell Phone	Email
Business Name & Address	
Website:	
Notes:	

4. Tax Statements

Document	Location	Notes
Current Tax Information		
Previous Year's Tax Returns		
Property Tax Statement		
Personal Property Tax (i.e., car)		

5. Financial Accounts (make multiple copies as needed)

Institution Name & Address		
Contact		Phone
Type of Account	Account Number	In Whose Name(s)
Document Location & Other Useful Information		

Institution Name & Address		
Contact		Phone
Type of Account	Account Number	In Whose Name(s)
Document Location & Other Useful Information		

6. Education / Childcare / Eldercare (make multiple copies as needed)

Family Member:		
Contact		
Institution		
Address		Phone
		Cell Phone
		Fax
		Emergency
Website		
Notes		

Family Member:		
Contact		
Institution		
Address		Phone
		Cell Phone
		Fax
		Emergency
Website		
Notes		

7. Medical (make multiple copies as needed)

Family Member:		
Doctor		Specialty:
Address		Phone
		Cell Phone
		Fax
		Emergency
Medication(s)		
Insurance		
Notes:		

Family Member:		
Doctor		Specialty:
Address		Phone
		Cell Phone
		Fax
		Emergency
Medication(s)		
Insurance		
Notes:		

Password Master List***

i.e., cell phone, credit cards, email, institutions, memberships, merchants, social media sites

Online Account	Website	Login ID	Password

***store in safe deposit box and another secure location