

Document Locator System

People usually keep their important records scattered in a variety of different places. Some may be kept in a file cabinet, others in a safety deposit box, while other vital information may be kept on file at out attorney's office.

With the use of The Document Locator System, you and your loved ones will be able to locate medical information, insurance papers, wills, and other important personal documents quickly and easily when the need arises.

How To Use The Document Locator System

Complete the questions on page 1, and any other items that may apply on the remaining pages. If any item does not apply to you mark the *Not Applicable* box after the item to let the reader know that you did not forget to address the item.

If you are married, this record should be kept in a secure location known to husband or wife. If you are not married, keep it in a location known to a close friend or relative. You should update this form once a year. It is a good idea to mark your calendar to ensure that you make updates at the same time each year, time tends to go by quickly!

Your Name: _____ **Date:** _____

Spouses Name: _____

Note the following important information in the event of your death:

1) I have written a personal letter to: _____

This letter is located _____

2) I have a living will: ___ Yes ___ No

The following people have copies of this will:

Name: _____ Phone: _____

Address: _____

Name: _____ Phone: _____

Address: _____

3) I have made arrangements to donate the following organs for transplant:

Organ: _____ Donate to: _____

Organ: _____ Donate to: _____

Please contact immediately in the event of death:

Name: _____ Phone: _____

Address: _____

Name: _____ Phone: _____

Address: _____

Please indicate the location of the following items:

Personal

Location

Not Applicable

Social Security Cards

--	--	--

Birth Certificates

--	--	--

Adoption Certificates

--	--	--

Marriage Certificate

--	--	--

Divorce/Separation Papers

--	--	--

Power of Attorney

--	--	--

Living Will

--	--	--

Original Will

--	--	--

Passports

--	--	--

Medical Records

--	--	--

Military Records

--	--	--

Personal ~ Other

Location

Not Applicable

Auto/Vehicle Title

--	--	--

Property Deeds

--	--	--

Post Office Box

--	--	--

Safety Deposit Box

--	--	--

Keys (house, car, etc.)

Funeral/Burial Instructions

--	--	--

Cemetery Plot Papers

--	--	--

Insurance

Location

Not Applicable

Medical Insurance

--	--	--

Life Insurance

--	--	--

Car/Vehicle

--	--	--

Homeowners/Rental

--	--	--

Long Term Care

--	--	--

Disability

--	--	--

Financial

Location

Not Applicable

Checking Accounts

--	--	--

Savings Accounts

--	--	--

Credit Union Accounts

--	--	--

Certificates of Deposit

--	--	--

Mutual Funds

--	--	--

Stocks & Bonds

--	--	--

Money Market Accounts

--	--	--

Retirement

Location

401- K, IRA, (etc.)

Not Applicable

Pensions

Social Security

--	--	--

Financial Liabilities

Location

Mortgage

Not Applicable

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Auto/Vehicle Loans

Personal Loans

Credit Cards

Tax Returns & Records

Location

Not Applicable

Tax Returns & Records

Year:	Year:	
Year:	Year:	
Year:	Year:	

Important Names & Numbers

Physicians

Name:	Phone:	
Name:	Phone:	
Name:	Phone:	
Name:	Phone:	

Clergy

Name:	Phone:	
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Attorney

Name:	Phone:	
Name:	Phone:	

Insurance Agents

Name:	Phone:	
Name:	Phone:	

Stock Brokers

Name:	Phone:	
Name:	Phone:	

Signature:	Date:
Signature:	Update:
Signature:	Update:
Signature:	Update:
Signature:	Update:
Signature:	Update:

****Please remember to update yearly and keep copy****

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