

# DOCUMENTS LOCATOR

## PIN Numbers / Access Codes / Passwords

## Notes

Bank by phone

Debit cards

Online banking

Computer

Web sites

ATM

Voice mail

Email

## Personal Bank Accounts

Account name & number

Names on account

Bank

Telephone number

Type of account

Location of account documents

Account name & number

Names on account

Bank

Telephone number

Type of account

Location of account documents

Account name & number

Names on account

Bank

Telephone number

Type of account

Location of account documents

## Installment Loans

Names on loan

Loan number \_\_\_\_\_  
Bank \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of loan papers \_\_\_\_\_

Names on loan \_\_\_\_\_  
Loan number \_\_\_\_\_  
Bank \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of loan papers \_\_\_\_\_

Names on loan \_\_\_\_\_  
Loan number \_\_\_\_\_  
Bank \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of loan papers \_\_\_\_\_

**Retirement Accounts**

Name on account \_\_\_\_\_  
Account reference number \_\_\_\_\_  
Type of account \_\_\_\_\_  
Bank/Employer/Brokerage Firm \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of account documents \_\_\_\_\_

Name on account \_\_\_\_\_  
Account reference number \_\_\_\_\_  
Type of account \_\_\_\_\_  
Bank/Employer/Brokerage Firm \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of account documents \_\_\_\_\_

Name on account \_\_\_\_\_  
Account reference number \_\_\_\_\_  
Type of account \_\_\_\_\_  
Bank/Employer/Brokerage Firm \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of account documents \_\_\_\_\_

**Savings Certificates**

Depositor \_\_\_\_\_  
Certificate number \_\_\_\_\_  
Bank \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of certificates \_\_\_\_\_

Depositor \_\_\_\_\_  
Certificate number \_\_\_\_\_  
Bank \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of certificates \_\_\_\_\_

**Savings Bonds**

Bond held by \_\_\_\_\_  
Type of bond \_\_\_\_\_  
Bond series number \_\_\_\_\_  
Location of bond \_\_\_\_\_

Bond held by \_\_\_\_\_  
Type of bond \_\_\_\_\_  
Bond series number \_\_\_\_\_  
Location of bond \_\_\_\_\_

**Stock Certificates**

Stockholder(s) \_\_\_\_\_  
Stock name \_\_\_\_\_  
Stock number \_\_\_\_\_  
Broker \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of stock documents \_\_\_\_\_

Stockholder(s) \_\_\_\_\_

Stock name \_\_\_\_\_  
Stock number \_\_\_\_\_  
Broker \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of stock documents \_\_\_\_\_

**Safe Deposit Box**

Box holder \_\_\_\_\_  
Has access to box \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Box number \_\_\_\_\_  
Bank \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Key location \_\_\_\_\_

**Cash on Hand**

Location \_\_\_\_\_  
Location \_\_\_\_\_  
Location \_\_\_\_\_  
Location \_\_\_\_\_

**Home Safe**

Has access to safe \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of combination or key \_\_\_\_\_

**Will**

Attorney \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of original will papers \_\_\_\_\_  
People with copies of will papers \_\_\_\_\_  
Telephone numbers \_\_\_\_\_

**Trust**

Established by \_\_\_\_\_  
Trust for \_\_\_\_\_  
Attorney \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of original trust papers \_\_\_\_\_  
People with copies of trust papers \_\_\_\_\_

Established by \_\_\_\_\_  
Trust for \_\_\_\_\_  
Attorney \_\_\_\_\_  
Telephone \_\_\_\_\_  
Location of original trust papers \_\_\_\_\_  
People with copies of trust papers \_\_\_\_\_

**Living Will**

Will of \_\_\_\_\_  
Attorney \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of original living will \_\_\_\_\_  
People with copies of living will \_\_\_\_\_  
Telephone number(s) \_\_\_\_\_

**Letters of Instruction**

Written by \_\_\_\_\_  
Location of original documents \_\_\_\_\_  
Telephone number \_\_\_\_\_  
People with copy of documents \_\_\_\_\_  
Telephone number(s) \_\_\_\_\_

**Social Security**

Name of beneficiary \_\_\_\_\_  
Social Security number \_\_\_\_\_  
Location of Social Security card \_\_\_\_\_

**Military Discharge Papers**

Veteran's name \_\_\_\_\_  
Service number \_\_\_\_\_  
Location of Discharge papers \_\_\_\_\_

**Income Tax Filings**

Name of taxpayer \_\_\_\_\_  
Tax identification number \_\_\_\_\_  
Tax adviser \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of tax records \_\_\_\_\_

**Passport**

Name on passport \_\_\_\_\_  
Passport number \_\_\_\_\_  
Location of passport \_\_\_\_\_

Name on passport \_\_\_\_\_  
Passport number \_\_\_\_\_  
Location of passport \_\_\_\_\_

**Driver's License**

Name on license \_\_\_\_\_  
License number \_\_\_\_\_

**Charge Accounts**

Account name (institution) \_\_\_\_\_  
Account number \_\_\_\_\_  
Name on account \_\_\_\_\_  
Location of card \_\_\_\_\_

Account name (institution) \_\_\_\_\_  
Account number \_\_\_\_\_  
Name on account \_\_\_\_\_  
Location of card \_\_\_\_\_

Account name (institution) \_\_\_\_\_  
Account number \_\_\_\_\_  
Name on account \_\_\_\_\_  
Location of card \_\_\_\_\_

**Medical Insurance Policy**

Subscriber's name \_\_\_\_\_  
Contract number \_\_\_\_\_  
Group number \_\_\_\_\_  
Insurance company \_\_\_\_\_  
Telephone number \_\_\_\_\_

**Long-Term Care Insurance Policy**

Name on policy \_\_\_\_\_  
Policy number \_\_\_\_\_  
Insurance company \_\_\_\_\_  
Insurance agent \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of policy \_\_\_\_\_

**Life Insurance Policies**

Name on policy \_\_\_\_\_  
Policy number \_\_\_\_\_  
Insurance company \_\_\_\_\_

Insurance agent	_____	_____
Telephone number	_____	_____
Location of policy	_____	_____
Name on policy	_____	_____
Policy number	_____	_____
Insurance company	_____	_____
Insurance agent	_____	_____
Telephone number	_____	_____
Location of policy	_____	_____

**Vehicle Ownership**

Vehicle make and model	_____	_____
Serial number	_____	_____
Where/when purchased	_____	_____
Telephone number	_____	_____
Name on title	_____	_____
Location of title papers	_____	_____
Vehicle make and model	_____	_____
Serial number	_____	_____
Where/when purchased	_____	_____
Telephone number	_____	_____
Name on title	_____	_____
Location of title papers	_____	_____

**Real Estate Ownership Documents**

Property address	_____	_____
Owner	_____	_____
Telephone number	_____	_____
Co-owner	_____	_____
Bank or mortgage company	_____	_____
Telephone number	_____	_____
Location of documents	_____	_____
Property address	_____	_____

Owner \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Co-owner \_\_\_\_\_  
Bank or mortgage company \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of documents \_\_\_\_\_

**Cemetery Plot**

Owner \_\_\_\_\_  
Plot intended for \_\_\_\_\_  
Cemetery \_\_\_\_\_  
Plot location \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Location of plot deeds \_\_\_\_\_

**Birth Record**

Name at birth \_\_\_\_\_  
Birth date \_\_\_\_\_  
Place of birth \_\_\_\_\_  
Birth certificate location \_\_\_\_\_

**Marriage License**

Names on license \_\_\_\_\_  
Marriage date \_\_\_\_\_  
State license issued \_\_\_\_\_  
License location \_\_\_\_\_

**Divorce Decree**

Names on decree \_\_\_\_\_  
Divorce date \_\_\_\_\_  
State divorce granted \_\_\_\_\_  
Decree location \_\_\_\_\_

**Pet History**

Name of pet	_____	_____
Breed	_____	_____
Date of birth	_____	_____
Sex	_____	_____
Animal hospital	_____	_____
Telephone number	_____	_____
Is promised to	_____	_____

Name of pet	_____	_____
Breed	_____	_____
Date of birth	_____	_____
Sex	_____	_____
Animal hospital	_____	_____
Telephone number	_____	_____
Is promised to	_____	_____