

# Vital Documents Locator

A tool to help keep your important information organized

DOCUMENTS	LOCATION
Last Will and Testament	
Revocable Living Trust	
Living Will	
Durable Powers of Attorney	
Deeds to Property	
Property Tax Bills	
Time Share Deeds	
Life Insurance	<hr/> <hr/>
Annuities	<hr/> <hr/> <hr/> <hr/>
Checkbooks	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Tax Records	<hr/> <hr/>

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DOCUMENTS	LOCATION
Stock & Bond Certificates	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
CD Certificates	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Marriage Certificates	
Birth Certificates	
Death Certificates	
Divorce Papers	

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DOCUMENTS	LOCATION
Military Discharge Papers	
Military Pension Document	
Social Security Card	
Passports	
Vehicle Registration	
Adoption Papers	
Medical Insurance Info	
Retirement Plans	
Other	

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## Financial Planner

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

## Banking Contact

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

## Certified Public Accountant (CPA)

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

## Real Estate Agent

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

## Attorney

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

## Landlord

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

## Doctor

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

## Business Associate

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

## Funeral Home

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

## Investment Professional

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_