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**LOCATION OF IMPORTANT DOCUMENTS**

**Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Client Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**(A) Residence: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**(B) Safe Deposit**

**Box Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**(C) Office Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**(D) Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**(E) Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**(F) Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**LOCATION OF IMPORTANT DOCUMENTS**

1. (B) (C) (D) (E) (F)

Will

Will (copy)

Powers of Attorney

Burial Instructions

Spouse's Will (original)

Spouse's Will (copy)

Cemetery Plot Deed

Doc Appointing Children's

List of Special Bequests

Safe Combination, Business

Safe Combination, Home

Trust Agreements

Life Insurance, Group

Life Insurance, Individual

Property and Casualty Insurance

Health Insurance Policy

Homeowner's Insurance Policy

Partnership Agreements

List of Checking and Savings Accounts

Bank Statements, Cancelled Checks

List of Credit Cards

Certificate of Deposit

Checkbooks

Savings Passbook

Investment Securities

Brokerage Account Records

Stock Certificates

Mutual Fund Shares

Bonds

Other Securities

Corporate Retirement Plan

Keough or IRA Plan

Annuity Contracts

Stock Option Plan

Stock Purchase Plan

**LOCATION OF IMPORTANT DOCUMENTS**

1. (B) (C) (D) (E) (F)

Profit sharing plan

Income and gift tax return

Titles and deed to real estate &

Rental property records

Notes and other loan agreements

Including mortgages

Stored and valuable possessions

Auto ownership records

Boat ownership records

Birth certificate

Citizenship papers

Adoption papers

Military discharge papers

Marriage certificate

Children’s birth certificates

Divorce/separation records

Names and addresses of relatives

And friends

Listing of professional & fraternal

Organization memberships

List of Usernames and Passwords

Other