

Locations of Important Papers and Information

Date _____

Item	Location	Contact
Last will and testament		
Durable power of attorney for finances		
Medical directives		
Trust documents		
Insurance policies		
Insurance policies		
Insurance policies		
Insurance policies		
Income tax returns		
Investment records		
Retirement plan documents		
Real estate deeds & mortgages		
Funeral arrangements		
Passports		
Divorce or custodial papers		
Safe deposit box		
Stock certificates or bonds		
Employment contracts		
Business agreements		
Health records		