

# Document Locator

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Help your power of attorney agents, executors and trustees by listing the location of the following documents in your home or office. Remove items that do not pertain to you.

Birth certificate –

Spouse’s birth certificate –

Citizenship papers –

Passport –

Marriage certificate –

Divorce / separation records –

Military discharge papers –

Children’s birth certificates –

Adoption papers –

Directives to children’s guardians –

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List of special considerations –

Safe combination (home) –

List of stored and loaned possessions –

Health insurance policy -

Homeowners policy –

Car insurance policy –

Property and casualty insurance -

Partnerships agreements –

List of partnerships –

Auto ownership records –

Titles and deeds to real estate –

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Title insurance to real estate –

Property rental records –

Life insurance policies –

Death benefit plans –

Employee retirement plans –

Keough plan –

IRAs –

Investments -

Bonds –

Annuity contracts –

Stock-option plans –

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Profit sharing plans –

List of checking and savings accounts –

Bank statements & cancelled checks –

Certificates of deposits –

Checkbooks –

Savings passbooks –

Credit cards –

Employment contracts –

Tax returns -

Income & gift tax returns –

Cemetery plot instructions –