

Getting Your Affairs in Order

Document Location Guide- Pg 1

Location of Important Legal & Financial Information

Personal Documents

Adoption Certificates: _____

Birth Certificates: _____

Baptism Certificates: _____

Death Certificates: _____

Diplomas: _____

Divorce Decrees: _____

Employment Records: _____

Family Health Records: _____

Military Records: _____

Marriage Records: _____

Passports: _____

Naturalization Papers: _____

Social Security Cards: _____

Tax Returns: _____

Username & Passwords: _____

Other: _____

Personal Property

Checkbooks: _____

Deeds: _____

Insurance policies (life, health, accident, long-term care, home, car, etc):



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Document Location Guide- Pg 2

Income Tax Records: _____

Inventory of Household Goods: _____

Jewelry Appraisals: _____

Mortgage(s) Paperwork: _____

Motor Vehicle Titles: _____

Records of Property Improvements: _____

Safe or Lock Box and Keys: _____

Name of banks, Account Type, and Account Numbers:

Stock Certificates: _____

Secret Hiding Locations: _____

Wills/Trusts & Instructions:

End of Life/Funeral Directions: _____

Wills & Trust Documents: _____

Health Care Power of Attorney: _____

Advance Directive/Living Will: _____

Power of Attorney: _____

Special Letters of Instruction: _____

Other: _____



Your Funeral Wishes

A Planning Guide

In the event of my death, the following can be used as a guide for my funeral and burial arrangements.

I wish the following persons to be pallbearers

In lieu of flowers, please ask for donations to:

I am a member of the following religious denominations/groups:

I am a member of the following fraternal organizations

Please write any special instructions