

# FAMILY DOCUMENT LOCATOR



**INSTITUTE  
for  
PREPARING  
HEIRS**

Name \_\_\_\_\_ Date \_\_\_\_\_

**PLEASE INDICATE THE LOCATION OF THE FOLLOWING ITEMS:**

## PERSONAL

Original Will (Self) \_\_\_\_\_  
Original Will (Spouse) \_\_\_\_\_  
Special Estate Instructions—Written \_\_\_\_\_  
Special Estate Instructions—Video \_\_\_\_\_  
Combination to Personal Safe \_\_\_\_\_  
Bank Safe Deposit Box \_\_\_\_\_  
Trust Documents \_\_\_\_\_  
Power of Attorney \_\_\_\_\_  
Health Care Power of Attorney \_\_\_\_\_  
Living Will \_\_\_\_\_  
Birth Certificate \_\_\_\_\_  
Military Records \_\_\_\_\_  
Marriage Certificate \_\_\_\_\_  
Divorce Papers \_\_\_\_\_  
Other \_\_\_\_\_  
(e.g., Adoption Papers)  
Other \_\_\_\_\_  
Other \_\_\_\_\_

## BUSINESS PROFESSIONAL

Partnership/LLC Documents \_\_\_\_\_  
Corporate Documents \_\_\_\_\_  
Inventory of Business Assets \_\_\_\_\_  
Buy/Sell Documents \_\_\_\_\_  
Pension Plans \_\_\_\_\_  
Other Employee Retirement Benefits \_\_\_\_\_  
(e.g., Nonqualified Deferred Compensation)  
Other \_\_\_\_\_  
Other \_\_\_\_\_

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PLEASE INDICATE THE LOCATION OF THE FOLLOWING ITEMS:

## TAX RETURNS & RECORDS

Income Tax Returns \_\_\_\_\_  
Records Re: Tax Bases of Property \_\_\_\_\_  
Gift Tax Returns \_\_\_\_\_  
Other \_\_\_\_\_

## INSURANCE POLICIES

Life Insurance—Group \_\_\_\_\_  
Life Insurance—Individual(s) \_\_\_\_\_  
Property/Casualty \_\_\_\_\_  
Umbrella Liability \_\_\_\_\_  
Disability \_\_\_\_\_  
Income Annuities \_\_\_\_\_  
Other \_\_\_\_\_

## FINANCIAL ASSETS

Checking Accounts \_\_\_\_\_  
Money Market Accounts \_\_\_\_\_  
Savings Accounts \_\_\_\_\_  
Certificates of Deposit \_\_\_\_\_  
Credit Union Accounts \_\_\_\_\_  
Securities Accounts \_\_\_\_\_  
Mutual Fund Accounts \_\_\_\_\_  
Other \_\_\_\_\_

## OTHER INSTRUMENTS/PAPERS

Original Deeds to Real Property \_\_\_\_\_  
Mortgages; Leases \_\_\_\_\_  
Affidavits Re: Domicile \_\_\_\_\_  
Affidavits Re: Community Property \_\_\_\_\_  
Affidavits Re: Separate Property \_\_\_\_\_  
Passwords \_\_\_\_\_  
Passwords \_\_\_\_\_  
Passwords \_\_\_\_\_