

## DOCUMENT LOCATION INFORMATION SHEET

A big problem for anyone trying to administer an estate can be simply finding all the property and valuable papers. You can do your heirs and executor a favor by filling out this form and giving copies to your relatives who will help in settling the estate, any outside executor and your lawyer. Update the information periodically.

Employer: \_\_\_\_\_ Telephone Number: \_\_\_\_\_

Employer: \_\_\_\_\_ Telephone Number: \_\_\_\_\_

My valuable papers and assets are stored in the following locations:

A. Residence: (address and where placed) \_\_\_\_\_  
\_\_\_\_\_

B. Safe Deposit Box No.: \_\_\_\_\_ at Bank \_\_\_\_\_  
Address: \_\_\_\_\_

C. Office: (address and where placed) \_\_\_\_\_  
\_\_\_\_\_

D. Other: \_\_\_\_\_

E. Other: \_\_\_\_\_

F. Other: \_\_\_\_\_

Item	Location					
	A	B	C	D	E	F
Will (Original) for						
Will (Original) for						
Will (Copy) for						
Will (Copy) for						
Power of Attorney, Advance Directive for						
Power of Attorney, Advance Directive for						
End of Life Information Sheet for						
End of Life Information Sheet for						
Burial Instructions						
Cemetery Plot Deed						
Safe Combination (business)						
Safe Combination (home)						
Safe Deposit Box Keys						
Life Insurance Policies						

	A	B	C	D	E	F
Other Insurance Policies						
Business Buy-Sell Agreements						
Old Income Tax Returns						
Bank Statements						
Checkbook						
Savings Passbooks						
Stock Certificates						
Brokerage Account Statements						
Deed & Title Insurance Papers						
Marriage/Divorce Papers						

**Important Names, Addresses and Phone Numbers**

**Accountant:**

**Lawyer:**

**Financial Advisor (s):**

**Banks & Brokerage Firms (Name & Branch)**

**Insurance Agent (s)**

**Life:**

**Property:**

**Health:**

**Funeral Instructions**

**Prepaid arrangements**

**Funeral Home:**

**Burial Plot:**

**I would like this person to officiate my funeral:**

**Special instructions:**

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Date this form prepared:

Copies given to: