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Personal Document Locator

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Please keep in a secure location.

This Personal Document Locator is simply a detailed list of where you store your important records and papers and who your primary advisors and contacts are. This list will assist your loved ones in the event of your death or disability. Keep this list at home along with your other important documents, and make sure a trusted family member knows where it is, or provide a copy to the family member, your executor, and/or your attorney.

Remember to update your Personal Document Locator at least once a year to ensure its accuracy.

Part A -- Personal Information
Name (first, middle, last)
Street Address
City, State, ZIP Code
Social Security Number
Date of Birth
Place of Birth

Part B -- Personal Contacts	
Attorney	
Name	Firm Name
Address	City, State, ZIP
Phone Number(s)	
Tax Preparer	
Name	Firm Name
Address	City, State, ZIP
Phone Number(s)	
Insurance Agent	
Name	Company Name
Address	City, State, ZIP
Phone Number(s)	
Financial Advisor	
Name	Company Name
Address	City, State, ZIP
Phone Number(s)	

Part B continued -- Online Accounts		
Website Address (URL)	**Username**	**Password**

Notes

Part C -- Location Key
Specify the location(s) where you keep your documents (e.g., home, office, safe, safe-deposit box). For each item in Part D, check the number that corresponds to the correct location.
Location 1
Location 2
Location 3
Location 4
Location 5

Part D -- Important Documents	1	2	3	4	5
Will					
Durable Power of Attorney					
Health-Care Directives					
Trust Agreements					
Birth Certificate					
Social Security Card					
Marriage Certificate					
Military Papers					
Adoption Papers					

Part D continued	1	2	3	4	5
Divorce/Separation Papers	☐	☐	☐	☐	☐
Vehicle Titles	☐	☐	☐	☐	☐
Deeds	☐	☐	☐	☐	☐
Safe-Deposit Box/Keys	☐	☐	☐	☐	☐
Bank Account Records (e.g., checking and savings accounts, CDs)	☐	☐	☐	☐	☐
Tax Returns	☐	☐	☐	☐	☐
Mortgage and Loan Papers	☐	☐	☐	☐	☐
Insurance Policies -- Home and Vehicles	☐	☐	☐	☐	☐
Insurance Policies -- Property and Casualty	☐	☐	☐	☐	☐
Insurance Policies -- Life	☐	☐	☐	☐	☐
Insurance Policies -- Health	☐	☐	☐	☐	☐
Business Papers (e.g., incorporation papers, trademarks, patents)	☐	☐	☐	☐	☐
Retirement Account Papers (e.g., IRAs, annuities)	☐	☐	☐	☐	☐
Investment Papers (e.g., securities, stocks, bonds, mutual funds)	☐	☐	☐	☐	☐
Proof of Citizenship	☐	☐	☐	☐	☐
Important Keys	☐	☐	☐	☐	☐
Antiques and Heirlooms	☐	☐	☐	☐	☐
Jewelry	☐	☐	☐	☐	☐
Cash	☐	☐	☐	☐	☐
Funeral Instructions (e.g., cemetery plot deed, burial instructions)	☐	☐	☐	☐	☐

Notes

IMPORTANT DISCLOSURES

Broadridge Investor Communication Solutions, Inc. does not provide investment, tax, legal, or retirement advice or recommendations. The information presented here is not specific to any individual's personal circumstances.

To the extent that this material concerns tax matters, it is not intended or written to be used, and cannot be used, by a taxpayer for the purpose of avoiding penalties that may be imposed by law. Each taxpayer should seek independent advice from a tax professional based on his or her individual circumstances.

These materials are provided for general information and educational purposes based upon publicly available information from sources believed to be reliable — we cannot assure the accuracy or completeness of these materials. The information in these materials may change at any time and without notice.

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