

Personal Document Locator

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 Code	
Date of Birth	
Phone Number(s)	

Tax Preparer

Name	
Firm Name	
Address	
City, State, ZIP Code	
Date of Birth	
Phone Number(s)	

Insurance Agent

Name	
Firm Name	
Address	
City, State, ZIP Code	
Date of Birth	
Phone Number(s)	

Financial Advisor

Name	
Firm Name	
Address	
City, State, ZIP Code	
Date of Birth	
Phone Number(s)	

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					
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, or legal advice. 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.