

Advisor & Document Locator

of

Name: _____

Date of Birth: _____

Social Security No: _____

Advisors

Attorney:

Name: _____

Address: _____

Phone: _____

Fax: _____

Accountant:

Name: _____

Address: _____

Phone: _____

Fax: _____

Financial Planner/Stockbroker:

Name: _____

Address: _____

Phone: _____

Fax: _____

Insurance Agent:

Name: _____

Address: _____

Phone: _____

Fax: _____

Clergy/Rabbi

Name: _____

Address: _____

Telephone: _____

Employer

Name: _____

Address: _____

Telephone: _____

Location of Employee Benefit documents: _____

Location of Important Documents

Power of Attorney (Financial): _____
Health Care Directive: _____
Will: _____
Revocable Trust: _____
Irrevocable Trust: _____
Prenuptial Agreement: _____
Divorce Decree: _____

Insurance Policies:

Auto/Home/Umbrella: _____
Health: _____
Disability: _____
Long Term Care: _____
Life: _____

Past Tax Returns: _____
Funeral Instructions: _____
Military Records and Benefits: _____
Retirement Accounts: _____
Real Estate Documents: _____
Other Asset Documents: _____
Location of Safe Deposit Boxes: _____

List of persons to contact in case of emergency

Name and relationship: _____
Address: _____
Phone: _____
Name and relationship: _____
Address: _____
Phone: _____
Name and relationship: _____
Address: _____
Phone: _____

Other helpful information: _____

