

This form can be filled in, saved, edited, and then printed.



Date _____

DOCUMENT LOCATION CHECKLIST

(page 1)

DOCUMENT	LOCATION
Birth Certificate (Or other proof of age)	
Will	
Power of Attorney	
Living Will	
Health Care Proxy	
Organ Donation Card	
Social Security Card	
Marriage License	
Prenuptial Agreements	
Divorce Papers	
Trust Agreements	
Citizenship Papers	
Passport	
Veteran's Discharge Papers	
Safety-Deposit Box (Bank)	
Safety-Deposit Key	
Mortgage Papers/Deeds	
Car Papers/Insurance	
Bank Accounts	
Checking	
Savings	
CDs	
Stocks/Bonds	
IRAs	
Keoghs	

DOCUMENT LOCATION CHECKLIST

(page 2)

DOCUMENT	LOCATION
CREDIT CARDS and #'s	
Income Tax Receipts	
Income Tax Returns	
Pension	
Life Insurance	
Health Insurance	
Supplementary Health Insurance	
Disability Insurance	
Medicare	
Medicaid	
Cemetery (Include Address)	
Burial Plot (Lot and Grave Number)	
Vault	
Final Wishes	