Location of Important Documents and Information for (Names)	·	Last Updated
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Tips: If you have not documented any of this information before, do one page at a time to make it more manageable. If an item does not apply to you, mark it "NA" (not applicable). Keep this document in a safe place, such as a safe deposit box. For an electronic version in Microsoft Word format, visit www.vacu.org. If you save the completed document on your PC, make sure the document is secure.

Item	Location of Actual	Name of Company	Policy or	Additional Notes/Beneficiary
1000	Document or Item	or Contact Information	Account No.	
Will		Name of executor or administrator		
Medical directives				
Durable power of attorney		Person you have given POA		
Trust documents		Trustee/successor trustee name		
Deeds/real estate				Property addresses
documents				
Birth certificates				
Passports				
Marriage license				
Divorce/guardian/				
custodian papers				
Children's records/				
deferred tuition records				
Military papers				
Health records				
Vehicle/boat title(s)				
Tax returns and records				
Business agreements				
Safe deposit box	Location of keys	Financial institution name and branch		Box # Who has access

ltem	Location of Actual Document or Item	Name of Company or Contact Information	Policy or Account No.	Additional Notes/Beneficiary
Insurance Policies:				
Primary heath insurance				
papers				
Additional health or				
hospitalization insurance				
Medicare card				
Medicare supplement policy				
Long-term care policy				
Auto insurance policy				
Homeowners policy				
Life insurance policy				
Life insurance policy				
Accidental death and				
dismemberment policy				
Disability insurance policy				
Other insurance policy				
Funeral/Burial:				
Funeral arrangements				
Cemetery lot deed				
Professional Services:				
Name of attorney				
Other				

Item	Location of Actual Document or Item	Name of Company or Contact Information	Policy or Account No.	Additional Notes/Beneficiary
Credit Union/ Bank Accounts:				
Checking account				
Savings account				
Other accounts				
Loans/Other Debts:				
Mortgage				
Vehicle loan				
Other loans/credit cards				

Item	Location of Actual Document or Item	Name of Company or Contact Information	Policy or Account No.	Additional Notes/Beneficiary
Investments:				
U.S. Savings Bonds				
Stocks/bonds/mutual funds				
Retirement/ IRAs/Deferred Compensation Plans:				
Pension/retirement plan				
401(k) plan/other deferred compensation plan				
Profit sharing plan				
Individual Retirement Accounts				
Other Assets of Value:				