



BRACKENS

FINANCIAL SOLUTIONS NETWORK LLC

Brackens Financial Solutions Network, LLC

250 South Clinton Street
Suite 110
Syracuse, NY 13202
315-930-4499
800-758-9843

info@brackensFSN.com
www.BrackensFSN.com

Personal Document Locator

Part A -- 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 -- 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 C -- 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 C 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					



The opinions voiced in this material are for general information only and are not intended to provide specific advice or recommendations for any individual. To determine which investment(s) may be appropriate for you, consult your financial advisor prior to investing. All performance referenced is historical and is no guarantee of future results. All indices are unmanaged and cannot be invested into directly.

The information provided is not intended to be a substitute for specific individualized tax planning or legal advice. We suggest that you consult with a qualified tax or legal advisor.

LPL Financial Representatives offer access to Trust Services through The Private Trust Company, N.A. an affiliate of LPL Financial.

Securities offered through LPL Financial, member of FINRA/SIPC. Investment advice offered through Stratos Wealth Partners, a registered investment advisor. Stratos Wealth Partners and Brackens Financial Solutions Network, LLC are separate entities from LPL Financial.



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