



Wealth is the ability to fully experience life.

List of Important Documents

Updated on: _____

Distributed to: _____

DOCUMENT	LOCATION	PHONE #	NOTES
Last Will and Testament			Last Updated:
Living Will/Advance Directive			Last Updated:
Power of Attorney			Last Updated:
Trust			Last Updated:
Safe Deposit Box			Key Location:
Personal Safe			Key Location/Combo:
Funeral Arrangements			
Financial Advisor			
CPA/Tax Consultant			
Attorney			
HR Contact			
HR Contact			
Bank Account			
Bank Account			
Bank Account			
Bank Account			
Non-Retirement Investment Acct			
Non-Retirement Investment Acct			
401(k)			
401(k)			

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DOCUMENT	LOCATION	PHONE #	NOTES
Traditional IRA			
Traditional IRA			
Traditional IRA			
Traditional IRA			
ROTH IRA			
ROTH IRA			
Annuity			
Annuity			
Pension			
Pension			
Life Insurance			
Life Insurance			
Long-Term Care Insurance			
Long-Term Care Insurance			
Disability Insurance			
Disability Insurance			
Property/Casualty Insurance			
Automobile Titles			
Boat Titles			
Trailer/RV/Misc Titles			
House Deeds			
Birth Certificates			
Marriage License			
Divorce/Separation Agreements			
Child Support Agreements			
Adoption Papers			
Online Accounts and Passwords			
Memberships/Subscriptions			
Passports			
Other			
Other			