



Keiber Retirement Solutions

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Personal Document Locator



Personal Document Locator

Please keep in a secure location.

This Personal Document Locator is simply a detailed list of where you store your important records and papers and who your primary advisors and contacts are. This list will assist your loved ones in the event of your death or disability. Keep this list at home along with your other important documents, and make sure a trusted family member knows where it is, or provide a copy to the family member, your executor, and/or your attorney.

Remember to update your Personal Document Locator at least once a year to ensure its accuracy.

| Part A -- Personal Information |
|--------------------------------|
| Name (first, middle, last) |
| Street Address |
| City, State, ZIP Code |
| Social Security Number |
| Date of Birth |
| Place of Birth |

Part B -- 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 C -- 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 D -- 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 D 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 | | | | | |
| | | | | | |

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