

# Important Papers Roadmap

(print last page for additional information if needed)

Personal Information	Self	Spouse
Full legal name		
SS#		
Birthdate		
Birthplace		

## Children

Full legal name	SS#	Birthdate	Address	Telephone #	email

additional

## Advisors/Contacts

Type	Name	Address	Telephone #	email
Accountant				
Attorney				
Financial Planner				
Doctor				
Dentist				
Realtor				
Keys - house				

additional

## Important Documents - Location Key

1-File:	2-Safe deposit box: bank/key	3-Other:
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Document	Location	Contact/Notes
Will/Trust Funeral arrangements		
Living Will Power of Attorney		
Deeds Titles Income Tax		
Birth certificate Social Security card Marriage/divorce certificates Passport		

**Insurance Policies**

Type	Company	Address	Telephone	Policy #	location
Auto					
House					
Medical					

additional

**Bank Accounts**

Type	Company	Address	Telephone	Account #	location
Checking					
Savings					

additional

**Credit Card**

Type	Company	Address	Telephone	Account #	location

additional

**Stocks**

Type	Company	Address	Telephone	Account #	location

**Retirement**

Type	Company	Address	Telephone	Notes	location

**Property – Vehicles**

Year/make/model	Purchase date	VIN #	License Plate #	Records	Title

additional

**Property – Real Estate**

Address	Purchase date	Purchase price	Property taxes	Records	Title

additional

**Property – Rental**

Address	Monthly rent	Tenants	Telephone	email	Title

**Passwords & Valuables** - List passwords, any antiques, cash, jewelry of value with locations

## Additional

### Children

Full legal name	SS#	Birthdate	Address	Telephone #	email

### Advisors/Contacts

Type	Name	Address	Telephone #	email

### Insurance Policies

Type	Company	Address	Telephone	Policy #	location

### Bank Accounts

Type	Company	Address	Telephone	Account #	location

### Credit Cards

Type	Company	Address	Telephone	Account #	location

### Property - Vehicles

Year/make/model	Purchase date	VIN #	License Plate #	Records	Title

### Property – Real Estate

Address	Purchase date	Purchase price	Property taxes	Records	Title

### Property – Rental

Address	Monthly rent	Tenants	Telephone	email	Title