

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:

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