



## Location of Valuables

A big hurdle for anyone administering an estate is locating valuable documents. You can do your heirs/executor a favor by organizing and clearly documenting where your important documents are stored. Fill out this form and give copies to your spouse, other relatives who may help in settling your estate, any outside executor, and your Estate Planning Attorney. It is prudent to update this form periodically, and, of course, each time you change the location of a document.

### Personal Information

Name:	Birthdate:	Social Security No.:
Spouse Name:	Birthdate:	Social Security No.:
Legal Address:		Date Completed:

### Document Locations

Please list the locations at which your documents are stored. Example:

#	Location	Address
1	Safe Deposit Box	Trusted Bank, 1234 Main St, Anywhere, USA
2	Personal File Cabinet	1234 Home St, Anywhere, USA

#	Location	Address
1		
2		
3		
4		
5		
6		

Additional copies of this form are available at [www.insightfa.com/client-corner/](http://www.insightfa.com/client-corner/)

## Document List

Please indicate the location number where each document/item can be found. If you do not have one of the listed documents please indicate so with an N/A:

<b><u>Estate Planning Documents</u></b>	Location #		Location #
Trust Document	_____	List of special bequests	_____
Durable Power of Attorney	_____	Durable Power of Attorney (spouse)	_____
Healthcare Directive	_____	Healthcare Directive (spouse)	_____
Last Will & Testament	_____	Last Will & Testament (spouse)	_____
Last Will & Testament (copy)	_____	Digital Legacy Request(s)	_____

## **Final Arrangements**

Burial instructions	_____	Cemetery deed/prepaid receipt	_____
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## **Insurance**

Life insurance, group	_____	Health insurance	_____
Life insurance, personal	_____	Auto insurance	_____
Homeowners insurance	_____	Property insurance	_____
Other death benefits	_____		_____

## **Financial Documents**

Bank account list	_____	Investment account list	_____
Bank statements	_____	Safe combinations	_____
Safe deposit box key	_____	Digital Assets Password list	_____

## **Contracts**

Employment contracts	_____	Corporate Documents/Partnership agreements	_____
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## Contacts

The following contacts have received a copy of this form for safe keeping:

Name	Relation	Address

This form is for your personal use only. It is NOT to be returned to Insight Financial Advisors. This form should be kept in a safe/secure place at all times. Insight Financial Advisors is not responsible for the misuse of this information.

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