

Personal Records Archive

For: _____

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[RECORD LOCATIONS]

SAFETY STORAGE

Safety Deposit Box #	Key Location	Person(s) w/Signature Authority
_____	_____	_____
Safety Deposit Box #	Key Location	Person(s) w/Signature Authority
_____	_____	_____
Personal Safe/Other Storage	Combination/Key Location	
_____	_____	

RECORD/LOCATION

- Birth Certificates _____
- Marriage Certificates _____
- Citizenship Papers _____
- Divorce papers _____
- Pre/Post Nuptial Agreements _____
- Tax Records _____
- W-2 Forms _____
- Mortgage _____
- Title House(s) _____
- Title Car(s) _____
- Military Records _____
- Household Records, Bills, Etc. _____
- Guardianship Letters _____
- Power of Attorney - Financial _____
- Power of Attorney - Healthcare _____
- Other Health Directives _____
- Living Will _____
- Loan Papers _____
- Organ Donation _____
- Burial Agreement _____

[EMPLOYMENT BENEFITS - NAME 1]

CURRENT EMPLOYER

Current Employer Name and Address _____

Potential eligible benefits available in the event of my death:

- Group Life Insurance
- Group Health Insurance (death benefit)
- Unpaid Salary
- Pension (survivor's benefits)
- Workmen's Compensation
- Deferred Compensation
- Profit Sharing (survivor's benefits)
- Other

Information is located at _____

Contact Person _____

PENSIONS/RETIREMENT

PENSION PLANS

Name and Address of Employer (Current & Prior)	Pension Identification Number
_____	_____
_____	_____

KEOGH PLAN

Name and Address of Company	Account Number
_____	_____
_____	_____

401 (k) PLANS

Name and Address of Company	Account Number
_____	_____
_____	_____

EMPLOYER STOCK OPTIONS

Incentive Stock Options	Non-Qualified Stock Options
_____	_____
_____	_____

[ONLINE ACCOUNTS]

LIST OF ACTIVE ONLINE ACCOUNTS:

Email Addresses:

_____	_____
Email Address 1	Log in & password
_____	_____
Email Address 2	Log in & password
_____	_____
Email Address 3	Log in & password

Banking/Employer Portals:

_____	_____
Website address/url	Log in & password
_____	_____
Website address/url	Log in & password
_____	_____
Website address/url	Log in & password

**Social Media Websites:
(Facebook, Linked in, Twitter, tumblr, Instagram)**

_____	_____
Website address/url	Log in & password
_____	_____
Website address/url	Log in & password
_____	_____
Website address/url	Log in & password
_____	_____
Website address/url	Log in & password
_____	_____