



Get It Together

If you weren't around to tell them, would your loved ones be able to find your most important information?

Go grab your birth certificate.

Maybe the search will be quick and easy. On the other hand, you might not have a clue where to find it. Your knowledge of this piece of paper's whereabouts—most likely the first significant thing assigned to your life—is a good litmus test. It tells just how organized you are with the documents that really matter—from that birth certificate to cemetery plot titles and everything in between. Sharing that information can help your loved ones when this information is needed quickly.

Important Stuff

Dozens of pieces of personal data float around, in both the physical and digital worlds, for each of us. Old bank statements. Last year's tax returns. The title for your car. An exercise in living a more organized life is pulling all of it together and having a designated place for things. Keep all your important documents in one secure place so that you can refer back to them easily. Then, ultimately, do yourself a favor and share this location with loved ones in case of travel, illness, or your eventual absence.

But where do you start collecting it all—both offline and online? Here's how.

Offline

Papers stacked on your office desk. Files stuffed into cabinets and drawers. Official documents sitting in safety deposit boxes at the local bank. These are pieces of data that only exist in the physical world. Keeping track of the location of each is key to staying organized with your important documents. Begin the adventure of compiling all of this together and placing it into a personal safe or secure firebox.

Online

Websites. Accounts. Passwords. It's easy to forget your digital data or how to even log on once you get there. You might have a password-protected spreadsheet file on your computer's desktop—but who will know it's even there if you can't point them to it? Putting all of your digital info onto a sheet of paper that you keep in a safe place can help bring it out of your machine and into the real world.

Key Points

- Pull together the most important info you have about your life into one easy-to-use document.
- Use an information locator to keep track now and help your family out when you're no longer able to access it all.
- Speak with your financial professional for help with tracking down the details and making sure it's all accessible, yet secure.

Client Conversations

Information Locator

Use the form on the next few pages to record all of this information for your future reference. Having one easy-to-use source that indicates where to find this important data can make everyone's lives a lot easier. Be as specific as possible and indicate where to find accounts in addition to account numbers. Attach one statement, where applicable. Print it out. Then secure it.

Important documents and other items	
<input type="checkbox"/> Birth certificates	<input type="checkbox"/> Safe deposit box information (location)
<input type="checkbox"/> Driver's license number	<input type="checkbox"/> Homeowner's/renter's insurance policy
<input type="checkbox"/> Passports	<input type="checkbox"/> Disability-insurance policies
<input type="checkbox"/> Social media/online accounts (Facebook, LinkedIn, X (Twitter), Google, Amazon)	<input type="checkbox"/> Other insurance policies
<input type="checkbox"/> Adoption papers	<input type="checkbox"/> Mortgage papers
<input type="checkbox"/> Marriage certificate	<input type="checkbox"/> Real estate deeds
<input type="checkbox"/> Citizenship papers	<input type="checkbox"/> Power-of-attorney and medical power-of-attorney documents
<input type="checkbox"/> Social Security cards	<input type="checkbox"/> Beneficiary-designation documents
<input type="checkbox"/> Military service records	<input type="checkbox"/> Titles to other properties
<input type="checkbox"/> GI insurance papers	<input type="checkbox"/> Cemetery plot titles
<input type="checkbox"/> Employee-benefit plan information	<input type="checkbox"/> Business agreements
<input type="checkbox"/> Life-insurance policies	<input type="checkbox"/> Pet health records
<input type="checkbox"/> Health-insurance policies	<input type="checkbox"/> Keys
<input type="checkbox"/> Dental-insurance policies	<input type="checkbox"/> Wills and trusts
<input type="checkbox"/> Online medical records	<input type="checkbox"/> Valuable personal property (artwork, collectibles, jewelry)
<input type="checkbox"/> Automobile-insurance policies	<input type="checkbox"/> Valuable intellectual property (trademarks, patents, copyrights)
<input type="checkbox"/> Automobile titles	

Recurring bills and payments	
<input type="checkbox"/> Mobile phone	<input type="checkbox"/> Food subscriptions (Blue Apron, Hello Fresh)
<input type="checkbox"/> Electric/gas	<input type="checkbox"/> Internet services
<input type="checkbox"/> Water	<input type="checkbox"/> Health-club memberships
<input type="checkbox"/> Cable/internet/phone	<input type="checkbox"/> Household services (lawn care, home care, etc.)
<input type="checkbox"/> Streaming services (Netflix, Spotify, Hulu)	<input type="checkbox"/> Recurring charitable donations
<input type="checkbox"/> Newspaper/magazine subscriptions	

Client Conversations

Financial accounts	
<input type="checkbox"/> Stock certificates	<input type="checkbox"/> 401(k)/IRA account statements
<input type="checkbox"/> Bond certificates	<input type="checkbox"/> 529 account statements
<input type="checkbox"/> Tax records	<input type="checkbox"/> Student-loan account statements
<input type="checkbox"/> Attorney contact	<input type="checkbox"/> Home-equity loan account statements
<input type="checkbox"/> Financial professional contact	<input type="checkbox"/> Personal loans
<input type="checkbox"/> Accountant contact	<input type="checkbox"/> Loan documents
<input type="checkbox"/> Insurance agent contact	<input type="checkbox"/> Cryptocurrencies (e.g., Bitcoin)
<input type="checkbox"/> Investment accounts	<input type="checkbox"/> Revenue from royalties or intellectual property
<input type="checkbox"/> Checking account statements	<input type="checkbox"/> Master limited partnerships
<input type="checkbox"/> Credit card accounts	<input type="checkbox"/> Annuity contracts
<input type="checkbox"/> Savings account statements	<input type="checkbox"/> Mortgage account statements

Human Backup

Identify the people in your life who you can trust with your information locator. You'll probably want to share this sheet and the accompanying documents with those family members or close friends whom you trust with the task.

Pulling It Together

Need help? Talk with your financial professional for help tracking down this data and to make sure it's all accessible for your loved ones. Once you've dug up the most important documents in your life and found trusted allies to help you, you'll be all set for the next time someone asks if you can go grab that birth certificate. You'll know exactly where it is.

Let a financial professional assist you with the process of tracking down and organizing the documents that truly matter.

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