

Personal Document Locator

A detailed list of where you store your important records and papers and who your primary advisors and contacts are. This list will assist your loved ones in the event of your death or disability.

Keep in a secure location

Personal Information (Spouse 1)	
Full Legal Name	
Street Address	
City, Street, ZIP	
Social Security Number	
Date of Birth	

Personal Information (Spouse 2)	
Full Legal Name	
Street Address	
City, Street, ZIP	
Social Security Number	
Date of Birth	

Gil Brandon IV, AAMS™

Financial Advisor | 859.232.8240 | Raymond James & Associates, Inc. member NYSE/SIPC
489 East Main Street, Ste. 200 Lexington, KY 40507

RAYMOND JAMES

Part 2: Personal Contacts

Attorney

Name			Firm
Phone			Email

Tax Preparer

Name			Firm
Phone			Email

Insurance Agent

Name			Firm
Phone			Email

Financial Advisor

Name			Firm
Phone			Email

RAYMOND JAMES

Part 4: Important Documents	
Document	Location(s)
<i>Will</i>	
<i>Power of Attorney</i>	
<i>Birth Certificate(s)</i>	
<i>Social Security Card(s)</i>	
<i>Marriage Certificate</i>	
<i>Trust Agreement</i>	
<i>Military Papers</i>	
<i>Adoption Papers</i>	
<i>Vehicle Titles</i>	
<i>Tax Returns</i>	
<i>Mortgage/ Loan Papers</i>	
<i>Insurance Policies</i>	
<i>Extra Keys</i>	
<i>Health-Care Directives</i>	
<i>Cash</i>	

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