# **Document Locator**



The location of your personal documents and information regarding your accounts is important in the event of an emergency and will be of great assistance to your family, trustee and/or executor. Please share this information with them. This form is provided for your convenience in reviewing the locations of various important documents. Please keep this information in a safe place like a safety deposit box. If we can be of any assistance, please do not hesitate to call.

DOCUMENTS	LOCATIONS	DOCUMENTS	LOCATIONS
Birth certificate(s)		Homeowners insurance policy	
Visa/Passport		Mortgage papers	
Adoption papers		Real estate titles/deeds	
Will(s)		Rental property records	
Trust agreements		Boat title(s)	
Family love letters		Boat insurance	
Burial instructions		Social Security card	
Power of attorney		Military service records	
Guardianship documents		Employment contracts	
Marriage certificate		Retirement plan	
Safe combination, home		Employee benefits plan	
Safe combination, business		IRA documents	
Life insurance, group		Brokerage account records	
Life insurance, personal		Notes and other loan papers	
Other death benefits		Divorce/separation records	
List of special bequests		Contacts for relatives	
Auto insurance policy		Cemetery lot titles(s)	
Auto title(s)		Safe deposit box	
Auto registration(s)		Safe deposit box key	
Health insurance policy			

This information is general in nature and is not intended to be legal, tax, or financial advice. Although Regions believes this information to be accurate, it cannot ensure that it will remain up to date. Statements or opinions of individuals referenced herein are their own-not Regions'. Consult an appropriate professional concerning your specific situation and irs.gov for current tax rules.



## **Document Locator**



### **CREDIT CARDS**

#### ACCOUNT NUMBERS

**ACCOUNT NUMBERS** 

**CONTACT NUMBERS** 

#### **BANK ACCOUNTS**

#### **PROFESSIONAL RELATIONSHIPS**

Investment Professional

Insurance Agent

Banker

Attorney

Executor/Trustee

CPA/Accountant

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