



# Glen Eagle Document Locator

*This is a 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 that anything happens to you. Keep this list at home in a safe place, along with your other important documents, and make sure that a trusted family member knows where it is. You can also consider providing a copy to a family member, your executor, and/or your attorney. Remember to update this information at least once a year to ensure its accuracy.*

Name \_\_\_\_\_

SSN \_\_\_\_\_

Today's Date \_\_\_\_\_

Date of Birth \_\_\_\_\_

Place of Birth \_\_\_\_\_

Residence Address \_\_\_\_\_

Office Address \_\_\_\_\_

## Document Locations

Will \_\_\_\_\_

Tax Records \_\_\_\_\_

SSN Card \_\_\_\_\_

Marriage License \_\_\_\_\_

House Deed \_\_\_\_\_

Car Titles \_\_\_\_\_

Leases \_\_\_\_\_

Business Papers \_\_\_\_\_

Passport \_\_\_\_\_



**Personal Contacts**

**Employer**

Name \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_

Benefits Admin \_\_\_\_\_

**Children's Guardian (if any)**

Name \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_

**Other**

Name \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_

Name \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_



**Safety Deposit Box**

Box Location \_\_\_\_\_

Key Location \_\_\_\_\_

Who has access? \_\_\_\_\_

Name(s) box is registered in \_\_\_\_\_

**Insurance**

**Life Insurance**

Agent \_\_\_\_\_

Company \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_

Policy Number \_\_\_\_\_

Policy Amount \_\_\_\_\_

**Homeowner's Insurance**

Agent \_\_\_\_\_

Company \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_

Policy Number \_\_\_\_\_



**Other Insurance**

Type	Company Name	Account Number	Login Information
Medical	_____	_____	_____
Disability	_____	_____	_____
Long Term	_____	_____	_____
Auto	_____	_____	_____
Other	_____	_____	_____

**Investments**

**Brokerage Accounts**

Company	Account Number	Login Information
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Other Investments**

Company	Account Number	Login Information
_____	_____	_____
_____	_____	_____
_____	_____	_____



**Bank Accounts**

Account Type \_\_\_\_\_

Account Number \_\_\_\_\_

Bank \_\_\_\_\_

Login Info \_\_\_\_\_

Account Type \_\_\_\_\_

Account Number \_\_\_\_\_

Bank \_\_\_\_\_

Login Info \_\_\_\_\_

**Debt**

**Credit Cards**

Company Account Number Login Information

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Student Loans**

Company \_\_\_\_\_

Loan Number \_\_\_\_\_

Login info \_\_\_\_\_



**Mortgage**

Bank \_\_\_\_\_

Phone Number \_\_\_\_\_

Loan Number \_\_\_\_\_

**Auto Loans**

Company \_\_\_\_\_

Phone Number \_\_\_\_\_

Loan Number \_\_\_\_\_

Company \_\_\_\_\_

Phone Number \_\_\_\_\_

Loan Number \_\_\_\_\_

**Other Loans**

Type \_\_\_\_\_

Company \_\_\_\_\_

Phone Number \_\_\_\_\_

Loan Number \_\_\_\_\_

Type \_\_\_\_\_

Company \_\_\_\_\_

Phone Number \_\_\_\_\_

Loan Number \_\_\_\_\_



**Advisors**

**Attorney**

Name \_\_\_\_\_

Firm \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_

**Executor of Will**

Name \_\_\_\_\_

Company (if any) \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_

**Accountant and/or Tax Prep.**

Name \_\_\_\_\_

Firm \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_

**Financial Advisor**

Name \_\_\_\_\_

Firm \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_



**Additional Login Information**

Website URL

Username

Password

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**Other Information**