

# VITAL DOCUMENTS LOCATOR

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Name: \_\_\_\_\_ Date: \_\_\_\_\_

DOCUMENTS	A	B	C	D	E	F
Last Will & Testament						
Revocable Living Trust						
Living Will						
Durable Power of Attorney						
Health Care Proxy						
Deeds to Property						
Property Tax Bills						
Time Share Deeds						
Promissory Notes						
Installment Contracts						
Life Insurance						
Annuities						
Stock & Bond Certificates						
Checkbooks						
Tax Records						
CD Certificates						
Limited Partnership Papers						
Oil & Gas Interest Forms						
Marriage Certificates						
Birth Certificates						
Death Certificates						
Divorce Papers						
Military Discharge Papers						
Military Pension Documents						
Social Security Card						
Immigration Papers						
Naturalization Papers						
Passports						
Vehicle Registration						
Adoption Papers						
Medical Insurance Information						
Retirement Plans						
Other						
Other						



1478 Marsh Road · Pittsford · NY · 14534

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Securities and advisory services offered through Commonwealth Financial Network, member FINRA/SIPC, a Registered Investment Advisor. Fixed insurance products and services offered through Thorley Wealth Management, Inc.

## Vital Documents Locator continued

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### Locations

A. \_\_\_\_\_ B.

C. \_\_\_\_\_ D.

E. \_\_\_\_\_

F. Does not exist



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