

Vital Documents Locator

Documents	A	B	C	D	E
Last Will and Testament					
Living Will					
Durable Power of Attorney					
Trust Documents					
Property Tax Bills					
Deeds to Property					
Promissory Notes					
Installment Contracts					
Life Insurance Contracts					
Annuity Contracts					
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 Document					
Social Security Card					
Immigration Papers					
Naturalization Papers					
Passports					
Vehicle Registration					
Adoption Papers					
Medical Insurance Info.					
Retirement Plans					
Credit Rating Documents					
Bankruptcy Documents					

Locations:

- A. _____
- B. _____
- C. _____
- D. _____
- E. **Does Not Exist**

Compliments of:



1100 S. Townsend Ave.
 Montrose, CO 81401
 970-249-9900

Important Contacts

Financial Planner

Name: ElderAdo Financial
Address: 1100 S. Townsend Ave
Phone: 970-249-9900
Email: jim@ElderAdoFinancial.com

Banker

Name: _____
Address: _____
Phone: _____
Email: _____

Certified Public Accountant (CPA)

Name: _____
Address: _____
Phone: _____
Email: _____

Real Estate Agent

Name: _____
Address: _____
Phone: _____
Email: _____

Attorney

Name: _____
Address: _____
Phone: _____
Email: _____

Landlord

Name: _____
Address: _____
Phone: _____
Email: _____

Doctor

Name: _____
Address: _____
Phone: _____
Email: _____

Business Associate

Name: _____
Address: _____
Phone: _____
Email: _____

Funeral Home

Name: _____
Address: _____
Phone: _____
Email: _____

Other

Name: _____
Address: _____
Phone: _____
Email: _____