

# 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: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

## 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: \_\_\_\_\_