

Asset Location Record

Name _____ Date _____

Employer _____

Social Security No. _____

Location of Records

A. Residence _____
Address

B. Safe Deposit Box _____

C. Office _____
Address _____

Corporate retirement plan.....	<input type="checkbox"/>						
Keogh or IRA plan	<input type="checkbox"/>						
Annuity contracts	<input type="checkbox"/>						
Stock-option plan	<input type="checkbox"/>						
Stock-purchase plan	<input type="checkbox"/>						
Profit-sharing plan.....	<input type="checkbox"/>						
Income and gift tax returns.....	<input type="checkbox"/>						
Titles and deeds to real estate and land	<input type="checkbox"/>						
Title insurance.....	<input type="checkbox"/>						
Rental property records	<input type="checkbox"/>						
Notes and other loan agreements, including mortgages	<input type="checkbox"/>						
List of stored and loaned valuable possessions	<input type="checkbox"/>						
Auto ownership records	<input type="checkbox"/>						
Boat ownership records.....	<input type="checkbox"/>						
Birth certificate.....	<input type="checkbox"/>						
Citizenship papers	<input type="checkbox"/>						
My adoption papers	<input type="checkbox"/>						
Military discharge papers	<input type="checkbox"/>						
Marriage certificate	<input type="checkbox"/>						
Children's birth certificates.....	<input type="checkbox"/>						
Children's adoption papers	<input type="checkbox"/>						
Divorce / separation records.....	<input type="checkbox"/>						
Names and addresses of relatives / friends.....	<input type="checkbox"/>						
Listing of professional and fraternal organization membership	<input type="checkbox"/>						
Passports.....	<input type="checkbox"/>						
Tax returns	<input type="checkbox"/>						
_____	<input type="checkbox"/>						
_____	<input type="checkbox"/>						
_____	<input type="checkbox"/>						
_____	<input type="checkbox"/>						

Important Names, Addresses and Phone Numbers

Accountant _____	Name _____	Address _____
Attorney _____	Name _____	Address _____
Bank (Checking Acct.) _____	Name _____	Address _____
Bank (Savings Acct.) _____	Name _____	Address _____
Money Market Fund _____	Name _____	Address _____
Savings & Loan _____	Name _____	Address _____
Credit Union _____	Name _____	Address _____
Financial Advisor _____	Name _____	Address _____

Financial Design Group, Inc.

27604 Marine View Drive South • Des Moines, WA 98198

(253) 946-6119 • (800) 792-2779 Outside of Seattle area • (253) 946-1304 Fax