

# Recording the Location of Your Important Papers and Valuable Property

**NAME** \_\_\_\_\_ **SOCIAL SECURITY NO.** \_\_\_\_\_  
**NYSTRS EMPLID** \_\_\_\_\_

My valuable property and important papers are in these locations (list address if needed).

Location **A** \_\_\_\_\_ Location **C** \_\_\_\_\_  
 \_\_\_\_\_

Location **B** \_\_\_\_\_ Location **D** \_\_\_\_\_  
 \_\_\_\_\_

List the letter for the corresponding location indicated above for each of your important documents.

**Location Wills & Estate Papers**

- \_\_\_\_\_ My will (original)
- \_\_\_\_\_ My will (copy)
- \_\_\_\_\_ Spouse's will (original)
- \_\_\_\_\_ Spouse's will (copy)
- \_\_\_\_\_ Trust Agreements
- \_\_\_\_\_ Power of Attorney
- \_\_\_\_\_ Living Will/Medical Instruc.
- \_\_\_\_\_ Birth Certificate
- \_\_\_\_\_ Marriage Certificate
- \_\_\_\_\_ Divorce/Sep. Papers
- \_\_\_\_\_ Military Papers
- \_\_\_\_\_ Funeral/Burial Instruc.
- \_\_\_\_\_ \_\_\_\_\_
- \_\_\_\_\_ \_\_\_\_\_
- \_\_\_\_\_ \_\_\_\_\_
- \_\_\_\_\_ \_\_\_\_\_

**Location Retirement Plan Documents**

- \_\_\_\_\_ NYSTRS Benefit Profile
- \_\_\_\_\_ 403(b), IRA, etc.
- \_\_\_\_\_ Military, other public pensions
- \_\_\_\_\_ Other private pensions

**Financial & Legal Affairs**

- \_\_\_\_\_ Tax Files
- \_\_\_\_\_ Titles (Car, Boat, etc.)
- \_\_\_\_\_ Mortgages, Notes
- \_\_\_\_\_ List of Checking, Savings  
and Other Accounts
- \_\_\_\_\_ List of Stocks, Bonds, Mutual  
Funds & Other Investments
- \_\_\_\_\_ Employment/Business Agree.
- \_\_\_\_\_ \_\_\_\_\_

**Location Insurance Policies**

- \_\_\_\_\_ Life
- \_\_\_\_\_ Health
- \_\_\_\_\_ Long-term Care
- \_\_\_\_\_ Homeowner/Renter
- \_\_\_\_\_ Car, Boat, etc.
- \_\_\_\_\_ Funeral Plan
- \_\_\_\_\_ \_\_\_\_\_

**Property & Other**

- \_\_\_\_\_ Keys to Home, Car,  
Buildings, Locks, etc.
- \_\_\_\_\_ Safe Deposit Keys
- \_\_\_\_\_ Safe & Combination
- \_\_\_\_\_ List of Stored &  
Loaned Properties
- \_\_\_\_\_ \_\_\_\_\_

**Safe Deposit Box Location** \_\_\_\_\_

**Other Location Information** \_\_\_\_\_

**Financial Accounts (Detail)**

Account Name	Account No.
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**Important Names, Addresses & Telephone Numbers**

NYSTRS 800-356-3128 or (518) 447-2900 (Albany Area)

Attorney \_\_\_\_\_

Insurance Agent \_\_\_\_\_

Accountant \_\_\_\_\_

Stock Broker \_\_\_\_\_

Other \_\_\_\_\_

**Copies given to:**

**Date Prepared:**