

Document locations and contacts

A paper map to records you already have

This worksheet records locations and contacts. Use your signed documents and the bank, provider or court's current process for questions about access.

Leave passwords, recovery codes, Social Security numbers and full account numbers off this sheet. Keep any separate access instructions in protected storage.

Prepared for

Last checked

Where this sheet is kept

Person told where to find it

A document or record

Document or record

Current original or copy?

Where it is kept

Who knows the location

Bank, provider or professional to contact

Access question or next check

Document locations and contacts (continued)

A document or record

Document or record

Current original or copy?

Where it is kept

Who knows the location

Bank, provider or professional to contact

Access question or next check

Date this sheet after a document or contact changes. A listed contact has not been appointed to a legal role by this sheet.

Getting Your Affairs in Order Checklist: Documents to Prepare for the Future. National Institute on Aging, NIH.
Content reviewed: February 1, 2023.

[https://www.nia.nih.gov/health/advance-care-planning/
getting-your-affairs-order-checklist-documents-prepare-future](https://www.nia.nih.gov/health/advance-care-planning/getting-your-affairs-order-checklist-documents-prepare-future)

Document contacts

This worksheet records locations and contacts. Use your signed documents and the bank, provider or court's current process for questions about access.

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A contact for locating records

Name or business

What records they can help locate

Official contact route

Question to ask

Print another copy for more contacts. Date this sheet after a document or contact changes. A listed contact has not been appointed to a legal role by this sheet.

How to Find a Long Lost Bank Account or Safe Deposit Box. Federal Deposit Insurance Corporation. December 2020; Last Updated: December 14, 2020.

<https://www.fdic.gov/consumer-resource-center/2020-12/how-find-long-lost-bank-account-or-safe-deposit-box>

Sample document-location sheet

Sample only. All names, businesses and places are fictional.

Leave passwords, recovery codes, Social Security numbers and full account numbers off this sheet. Keep any separate access instructions in protected storage.

Prepared for: Marion Brooks

Last checked: October 13, 2026

Where this sheet is kept: Blue household folder, study cabinet

Person told where to find it: Alex Brooks

Will

Document or record: Will

Current original or copy?: Signed original

Where it is kept: Brooks Legal, client-file storage

Who knows the location: Marion and Alex

Bank, provider or professional to contact: Brooks Legal office contact listed in household address book

Access question or next check: Ask the office what a person requesting the original must provide.

Healthcare directive

Document or record: Healthcare directive

Current original or copy?: Signed original at home; copies shared

Where it is kept: Blue household folder; doctor's office has a copy

Who knows the location: Marion

Bank, provider or professional to contact: Regular doctor's office, official office number in address book

Access question or next check: Confirm which version the office has and which contact process applies.

Fictional sample. Marion will check the contact list after the next document update.

Sample document-location sheet

Sample only. All names, businesses and places are fictional.

Leave passwords, recovery codes, Social Security numbers and full account numbers off this sheet. Keep any separate access instructions in protected storage.

Prepared for: Marion Brooks

Last checked: October 13, 2026

Where this sheet is kept: Blue household folder, study cabinet

Person told where to find it: Alex Brooks

Bank record list

Document or record: Bank record list

Current original or copy?: List of provider names and record locations

Where it is kept: Private household file

Who knows the location: Marion and Alex

Bank, provider or professional to contact: Bank contact route from current statement

Access question or next check: Ask which records the bank needs before releasing account information.

Recent tax records

Document or record: Recent tax records

Current original or copy?: Record location note

Where it is kept: Accountant's client folder; household file has a copy

Who knows the location: Marion

Bank, provider or professional to contact: Accountant's office contact in address book

Access question or next check: Ask how an authorized requester obtains the records.

Fictional sample. Marion will check the contact list after the next document update.