



IAFF-FC FrontLine Program | Personal document locator

Make it easy on your loved ones

Keep your important information in one safe place



Keep important information in one place

Review this document every year when you do your taxes.

In an emergency, your family members need to be able to locate important information and documents quickly. This booklet was designed to help you organize that information all in one place. Fill out each section and **keep your booklet in a secure location**, such as a lockbox, home safe or safe-deposit box. Be sure to let a trusted loved one or the executor of your estate know where it's stored and how to access it.

Personal information

Your name:

Birthdate:

Birthplace:

Social Security number:

Current employer:

Address:

Mother's maiden name:

Spouse/partner's name:

Mother's maiden name

Birthdate:

Birthplace:

Social Security number:

Current employer:

Union/IAFF representative:

Union/IAFF representative phone:

Union/IAFF representative email:

Dependent information

Child/dependent's name:

Birthdate:

Social Security number:

Child/dependent's name:

Birthdate:

Social Security number:

Child/dependent's name:

Birthdate:

Social Security number:

Child/dependent's name:

Birthdate:

Social Security number:

Child/dependent's name:

Birthdate:

Social Security number:

Emergency information | The following is a list of information and documents that your family may need quick access to in an emergency.

Medical information	Name/policy number	Phone number/location
Hospital of choice		
Primary care physician		
Organ donor (Y/N)	N/A	N/A
Health insurance (or Medigap) policy number		
Do not resuscitate documentation		
Medicare, Medicaid or VA cards		
Health care power of attorney/living will		
Will/trust		
Financial power of attorney		
Doctor(s)		
Dentist		

Funeral information	Name/description	Phone number	Location
Prepaid funeral arrangements			
Cemetery plot and number			
Preferred clergy/family advisor			
Place of worship			
Special/other instructions			

Retirement accounts

Account type	Account number	Financial institution/trustee	Phone number	Beneficiary name(s)
457(b) deferred compensation			1-877-677-3678 FrontLinePlan.com	
Traditional IRAs				
Roth IRAs				
401(a), 401(k) or other employer-sponsored plans				
Keogh, SEP or SIMPLE				
Pension				
Social Security		ssa.gov 1-800-772-1213		
Other retirement investments (e.g., DROP, HRA, HSA)				

Education accounts

Account type	Account number	Financial institution/trustee	Phone number	Beneficiary name(s)
Education IRA/Coverdell ESA				
529 qualified tuition plan(s)				
Custodial account(s)				
Other				

Family advisors List your personal and business advisors.

Type of advisor	Name	Phone number	Address
Accountant/tax preparer			
Executor of estate			
Attorney			
Financial planner/investment advisor			
Insurance agent(s)			
Employer benefits administrator			
Other			

Valuable papers The exact location of valuable papers is key. Under "Location," clearly describe where — desk, drawer, closet, safe-deposit box, etc. — you keep your valuable papers.

Document type	Location
Marriage license/birth certificates/Social Security cards	
Deed(s) to real estate	
Property improvement records	
Mortgage papers/title/payment receipts	
Mortgage payment receipts	
Homeowners insurance policies	
Motor vehicle insurance policies	
Motor vehicle title(s)	
Warranties (home, auto, etc.)	
Other property	
Passports	
Military service papers	

Financial accounts : List your accounts and other services.

Financial firm's name/address	Identification number	In whose name	Username/password
Checking accounts			
Savings accounts			
Certificates of deposit			
Money market accounts			
Living trust accounts			
Safe-deposit box			
Other			

Outstanding liabilities : List outstanding loans, home equity lines of credit, mortgage, credit card debt, student loans, etc.

Type	Creditor/company name	Creditor address	Account number

Securities (stocks/bonds/other securities)

Asset	Identification number	Date purchased	Purchase price	Other information (name of owner, no. of shares, maturity date)

Mutual funds

Company name and fund	Identification number	Date purchased	Original amount	Other information (name of owner, no. of shares, maturity date)

