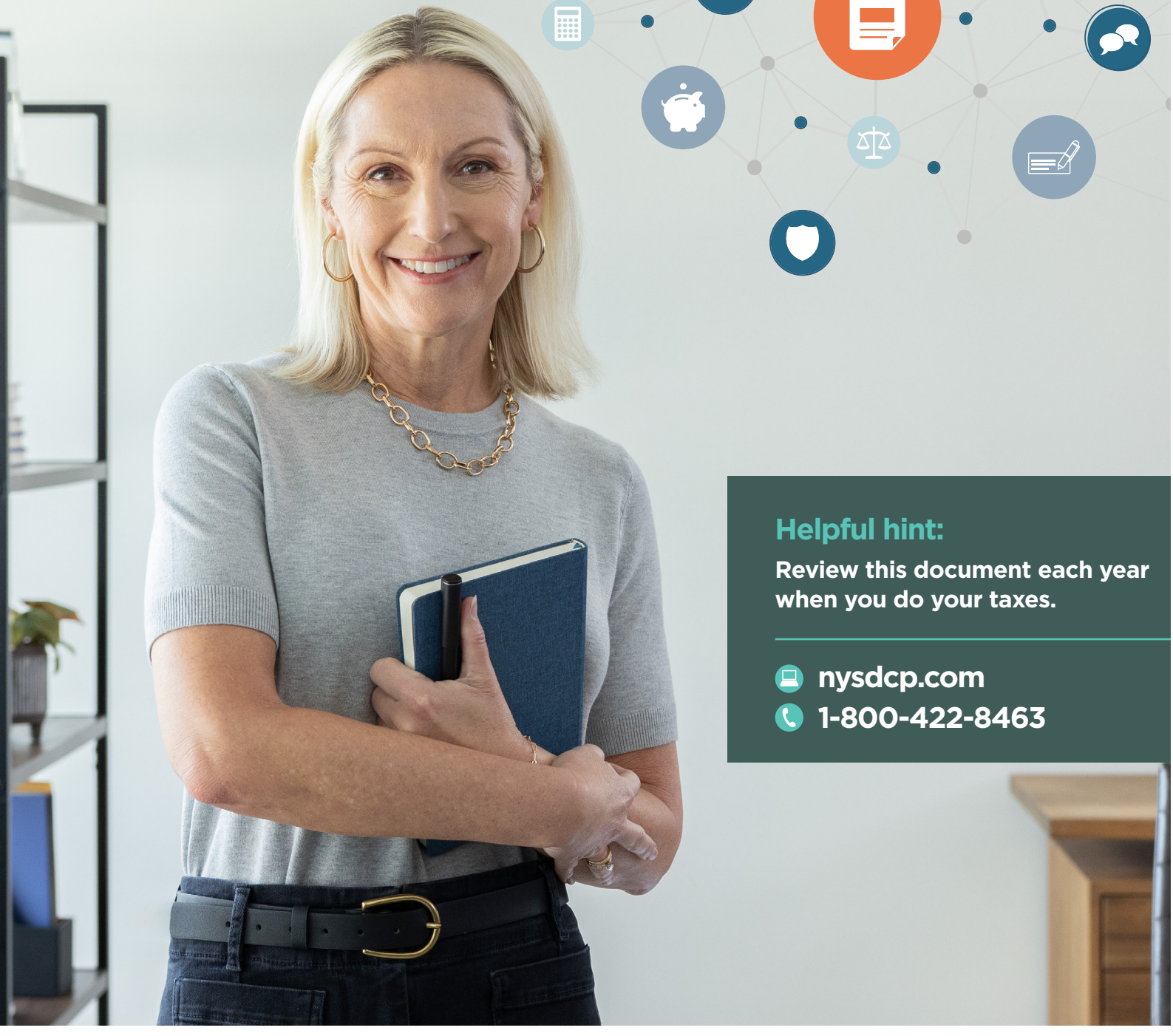
Personal Document Locator

Keep your important information in one place

New York State
Deferred Compensation Plan
A 457(b) Plan for Your Future



Helpful hint:

Review this document each year when you do your taxes.

nysdcp.com
1-800-422-8463

Regular financial accounts

List your accounts and other services.

Financial firm's name/address	Identification number	In whose name
Checking accounts		
Savings accounts		
Certificates of deposit		
Money market certificates		
Trust accounts		
Safe-deposit boxes		
Other		

Outstanding liabilities

List outstanding loans, home equity lines, mortgage, credit card debt, student loans, etc.

Type	Creditor/company name	Creditor address	Account number

Securities accounts (stocks/bonds/other securities)

Firm/Asset	Account number	Contact information	In whose name

Mutual funds

Company name and fund	Account number	Contact information	In whose name

Make it easier for your loved ones

In an emergency, your family members need to be able to locate important information and documents quickly. This document locator tool is 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, etc. **Be sure to let a 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:

Spouse/partner's name:

Birthdate:

Birthplace:

Social Security number:

Current employer:

Family member information

Name/relationship:

Birthdate:

Address/phone number:

Family member information

Name/relationship:

Birthdate:

Address/phone number:

Name/relationship:

Birthdate:

Address/phone number:

Name/relationship:

Birthdate:

Address/phone number:

Name/relationship:

Birthdate:

Address/phone number:

Name/relationship:

Birthdate:

Address/phone 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	Location	Phone number
Hospital of choice		
Primary doctor		
Other doctor(s)		
Dentist		

Insurance/financial information	Location	Contact/phone number/ policy number
Health insurance (or Medigap) policy number		
Medicare, Medicaid or VA cards		
Health care power of attorney/ living will		
Will/trust		
Financial power of attorney		
Health care proxy/living will		
Checkbook and banking information		

Funeral information	Location	Contact/phone number
Prepaid funeral arrangements		
Cemetery plot and number		
Preferred clergy/family advisor		
Church		
Special/other instructions		

Retirement accounts

Account type	Account number	Financial institution/trustee	Phone number	Beneficiary name(s)
New York State Deferred Compensation Plan (NYSDCP)			1-800-422-8463 nysdcp.com	
Traditional IRAs				
Roth IRAs				
401(k), 403(b) or other employer-sponsored plans				
Keogh, SEP or SIMPLE				
Pension				
Social Security			ssa.gov 1-800-772-1213	
Other retirement investments				

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			
Banker			
Financial planner/investment advisor			
Insurance agent(s)			
Company 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/family birth certificates	
Deed(s) to real estate	
Property improvement records	
Mortgage papers/title	
Mortgage payment receipts	
Homeowners insurance policies	
Motor vehicle insurance policies	
Motor vehicle title(s)	
Other property	
Passports	
Military service papers	

Life insurance

Person insured	Type	Face value	Policy number	Beneficiary name(s)	Insurance company

Annuities

Person insured	Type	Face value	Policy number	Beneficiary name(s)	Insurance company

Disability insurance

Person insured	Type	Face value	Policy number	Beneficiary name(s)	Insurance company

Digital information

So much of what we do today is online. Providing access to your digital accounts can help save your family members or executor time and hassle. Be sure to update this section frequently, especially the passwords.

Security codes

Type	Security code/password
Personal computer	
Laptop	
Tablet	
Cellphone	
Voicemail	
Home alarm	
Other	

Digital accounts

Account type	Username	Password	How account should be handled (e.g., closed, "friends/ followers" notified)
Personal/business email accounts			
Personal/business social media accounts			

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