

Personal document locator

Make it easy on your loved ones.
Keep your important information in one place.



Review this document every year when you do your taxes.

Service Center:

257 East Town Street, Suite 457
Columbus, Ohio 43215-4626

 Ohio457.org

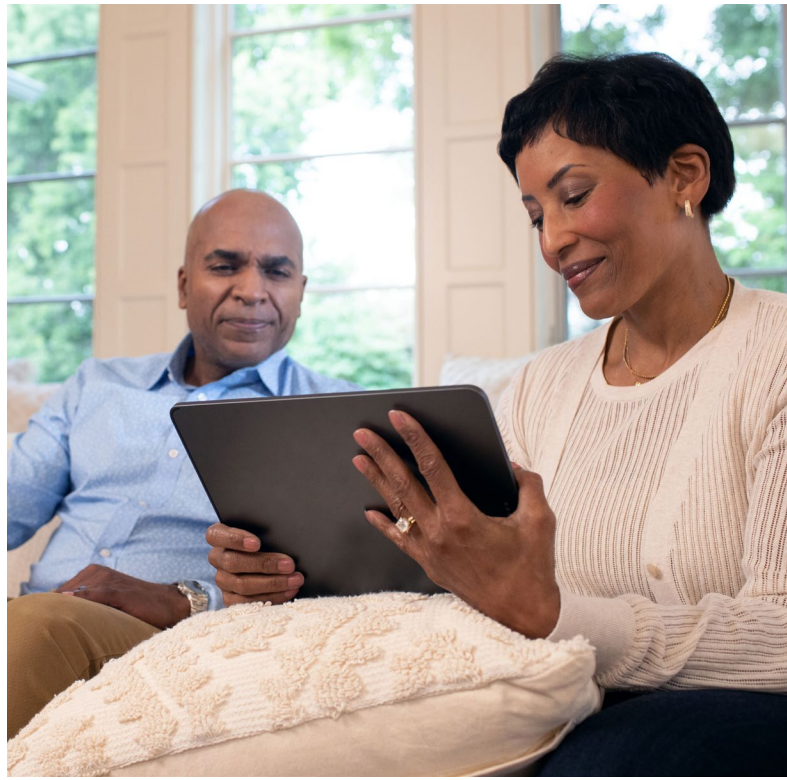
 877-644-6457



**Deferred
Compensation**
Invest in you.

Keep important information in one place.

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 safety deposit box. 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:

Dependent information

Child/dependent's name:

Birthdate:

Social Security number:

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	Phone number	Location
Hospital of choice		
Primary doctor		
Insurance/financial information	Contact/phone number/policy number	Location
Health insurance (or MediGap)		
Medicare, Medicaid or VA cards		
Health care power of attorney/ living will		
Will/trust		
Financial power of attorney		
Checkbook and banking information		
Funeral information	Contact/phone number	Location
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)
Ohio Deferred Compensation			877-644-6457 Ohio457.org	
Traditional IRAs				
Roth IRAs				
401(k), 403(b) or other employer-sponsored plans				
Keogh, SEP or SIMPLE				
Pension				
Social Security			ssa.gov 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			
Doctor(s)			
Dentist			
Other			

Valuable papers : The exact location of valuable papers is key. Under “Location,” clearly describe where — desk, drawer, closet, safety 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	

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		
Safety 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 (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)

Life insurance/annuities

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			

NOTES
