

FIRST DAKOTA NATIONAL BANK

FINANCIAL INFORMATION LOCATOR

Birth Certificate _____

Adoption Papers _____

Marriage Certificates _____

Citizen Papers _____

Social Security Card _____

Passwords _____

Military Service Records _____

Employee Benefit Plan Information _____

Life Insurance Policy _____

Health Insurance Policy _____

Auto Insurance Policy _____

Homeowners/Renter's Insurance Policy _____

Disability Insurance Policy _____

Other Insurance Policy _____

Mortgage Papers _____

Mortgage Payment _____

Real Estate Deed _____

Title to Auto _____

Title to Other Real Estate _____

Title to Cemetery Plot _____

Business Agreements _____

Credit Cards _____

Safe Deposit Box _____ Location of Key _____

Certificate of Deposits _____

Retirement Plans _____

Stock Certificates _____



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Tax Records _____
Investment Account Statements _____
Savings Account Statements _____
Checking Account Statements _____
Wills and Trust _____
Other Loans/Credit Card Documents _____
Other Important Documents _____

Advisors:

Attorney _____
Accountant (CPA) _____
Tax Preparer _____
Banker _____

Important Documents:

Living Will _____
Power of Attorney _____
Will _____
Division of Personal Property _____

Other Contacts:

Plumber _____
Electrician _____
Water system _____
Furnace _____
Water softener system _____
Air/heating system _____
Garbage _____



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FINANCIAL INFORMATION LOCATOR

List the name, address and phone number of financial institutions you do business with.

Example: Banks, brokerage firms, credit card companies, etc.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____



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