

FIRST DAKOTA NATIONAL BANK

FINANCIAL INFORMATION LOCATOR

Your loved ones do not need to know what is on this form, only where to find it when the times comes.

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 _____

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Retirement Plans _____

Stock Certificates _____

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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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. _____
