

## Document locator

Always follow your attorney's directions on storing documents. The following are general guidelines.

Document		Suggested location	Your location
<b>Wills</b>	Make sure that guardians, trustees and personal representatives (executors) are informed of the role you have asked them to assume.	Store the original in a safe place, but not a safe deposit box. Your attorney and personal representative may keep a copy. In some states, the original is filed with the Clerk of the County Court.	
<b>Trust agreements</b>	Trustees and successor trustees should be notified.	A copy can usually be kept in your files. Keep the original of the trust documents – together with receipts for property transferred to the trust – in your safe deposit box.	
<b>Power(s) of Attorney</b>	Provides another person the legal right to handle certain or all of your financial affairs if you are unable to do so.	Your attorney may keep the signed original. In some states, you can keep copies in a safe place at home. In addition, you may want to send an original to your Power of Attorney.	
<b>Living wills and medical/health care power of attorney</b>	Varies by state. Essential in the event of disability or terminal illness to provide caregivers with your instructions on life support, "heroic measures".	Forward these documents to your clinic or physician's office and keep a copy in a safe place at home. Your attorney may also keep a copy.	
<b>Buy-sell agreements</b>	Provides a mechanism for your business to continue when you are no longer involved in the business.	A copy can be kept in your files. Keep the original in your safe deposit box.	
<b>Marriage certificate</b>	Important in claiming benefits for surviving spouse.	Safe deposit box.	
<b>Birth certificates</b>	Important in proving age for Social Security and survivor's benefits, applying for passport and so on.	Safe deposit box.	
<b>Jewelry, artwork, other collectibles</b>	Most states allow a list separate from the will indicating who should receive certain tangible personal property.	The separate list, signed and dated, should be kept in the same location as the will.	

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<b>Service records/ discharge papers</b>	Important in claiming veteran's and survivor's benefits.	Safe deposit box.
<b>Adoption records</b>	Important for proving rightful heirs, if necessary.	Safe deposit box.
<b>Prenuptial agreement</b>	May control survivor's benefits and inheritance.	Safe deposit box.
<b>Divorce decree</b>	May be necessary if there is any claim against the estate.	Safe deposit box.
<b>Car and other titles, abstracts and deeds</b>	Important to prove ownership and/or survivorship interest.	Safe deposit box.
<b>Mutual funds accounts</b>	Name of company, account numbers and so on are necessary for estate inventory.	Record account information and store in your financial files.
<b>Savings bonds, stock certificates, bonds, etc.</b>	Important to prove ownership and/or survivorship interest; Necessary for estate inventory.	Record account information. Safe deposit box.
<b>IRAs, 401(k), etc.</b>	Necessary for estate inventory and beneficiary designations.	Record account information and store in your financial files.
<b>Annuities</b>	Necessary for estate inventory and beneficiary designations.	Record account information and store in your financial files.
<b>Life insurance policies</b>	Important in determining rightful beneficiaries, whether proceeds will be included in taxable estate and so on.	Record contract information and store policies in your files.
<b>Death certificate</b>	Important for claiming death benefits and perfecting title.	Obtained at time of death.
<b>Tax returns</b>	Keep a copy of your tax returns for the past 10 years.	Retain copies in your files and with your CPA.
<b>List of passwords</b>	Usernames and passwords for email accounts, personal computers and social media sites may be important for survivors.	Legacy Lockbox or safe deposit box.
<b>Bank/financial institution information</b>	Account information such as numbers and user names and passwords for online access.	Safe deposit box.
<b>Other</b>		

The information provided in this piece is for general reference only and is not legal advice. You should consult an attorney who is licensed to practice law in your state of residence to interpret and apply this information to your particular situation.

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