

Important Information & Document Locator

Know what exists, where the current version is kept, and who can access it.

Important information is useful only if the right person can find it when it is needed. This pack is designed primarily as a locator—not as another place to copy legal, financial, medical, insurance, or identifying information.

USE A MAP, NOT ANOTHER PILE

Record where the official document or current information is kept, who has authorized access, and when it was last reviewed. This can reduce duplicate copies and make it easier to identify the current version.

PROTECT SENSITIVE INFORMATION

Do not write passwords, PINs, Social Security numbers, full bank or credit-card numbers, or other unnecessary sensitive information in this pack. Store the completed locator securely and follow the person's wishes and any applicable authorization requirements.

ACCESS IS NOT THE SAME AS AUTHORITY

Knowing where a document is located does not create legal authority to use it, make decisions, access records, or manage someone else's money. A family relationship alone does not necessarily provide that authority.

REVIEW AFTER MEANINGFUL CHANGES

Review the locator after a move, hospitalization, insurance change, new provider or service, change in decision-making authority, replacement of an important document, or other major life change. A regular annual review is also useful.

START WITH WHAT MATTERS MOST

- ☐ Healthcare and medication information
- ☐ Insurance and benefits
- ☐ Advance care planning documents
- ☐ Legal and decision-making documents
- ☐ Financial and household records
- ☐ Identity and personal records
- ☐ Service and provider information

LAST REVIEWED

Date: _____ Reviewed with: _____

Important Contacts

Record people and organizations someone may need to reach quickly. Include only information appropriate to keep in this locator.

Name / Organization	Role	Phone / Contact	When to Contact

Who should usually be contacted first?

Who else should know where this locator is kept?

Healthcare & Insurance Locator

Use locations and contact information rather than copying unnecessary medical or insurance details.

Document / Information	Where Current Version Is Kept	Authorized Contact / Access	Last Reviewed
Current medication list			
Healthcare provider list			
Allergy / reaction information			
Health insurance / Medicare / Medicaid			
Long-term care insurance, if applicable			
Advance directive / living will			
Healthcare proxy / health care POA			
Medical orders or other current forms			
Other: _____			

Something that still needs to be located, updated, or confirmed:

Legal & Decision-Making Document Locator

This page records where documents are kept. It does not create or change legal authority.

Document / Information	Where Current Version Is Kept	Authorized Contact / Access	Last Reviewed
Will			
Financial power of attorney			
Trust documents, if applicable			
Guardianship / conservatorship documents, if applicable			
Healthcare decision-making documents			
Funeral / burial / memorial instructions, if documented			
Attorney contact information			
Other: _____			

A document or authority that needs clarification:

Person or professional to contact about it:

Financial, Benefits & Household Locator

For privacy, identify the institution, record type, or location without writing full account numbers, passwords, PINs, or other credentials.

Document / Information	Where Current Version Is Kept	Authorized Contact / Access	Last Reviewed
Banking / financial institution records			
Income / pension / Social Security information			
Investment / retirement records			
Recent tax records			
Home / deed / mortgage records			
Vehicle title / registration / insurance			
Utility / household service records			
Benefits / assistance program information			
Safe deposit box information / key location			

Something that still needs to be located or updated:

Personal Records & Other Important Information

Document / Information	Where Current Version Is Kept	Authorized Contact / Access	Last Reviewed
Birth certificate			
Marriage / divorce / adoption records			
Citizenship / immigration records, if applicable			
Military records, if applicable			
Property / valuable-item records			
Pet care / veterinarian information			
Membership / community / faith contacts			
Digital information instructions — secure location only			
Other: _____			

IMPORTANT PRIVACY REMINDER

For digital accounts, record where secure access instructions are maintained rather than placing passwords or authentication codes on this page.

Other information someone may need to know exists:

Information Update & Review

Use this page when something changes so outdated information does not continue to circulate.

Information / Document	What Needs to Change?	Who Will Check or Update It?	Date / Status

Old copies or outdated information that should be removed, marked, or replaced:

Who needs the updated information?

NEXT REVIEW

Planned review date: _____

Also review sooner after a major health event, move, insurance change, change in legal authority, or replacement of an important document.