



Payne Nickles & Company, CPAs

Name: _____

LOCATION OF DOCUMENTS

DOCUMENTS IN MY HOME ARE LOCATED:

DOCUMENTS IN MY OFFICE ARE LOCATED:

MY SAFE DEPOSIT BOX (S.D.B) IS LOCATED:

MY CURRENT WILL OR TRUST (DATED: _____)

Home Office S.D.B. N/A Other: _____

INCOME TAX RETURNS

Home Office S.D.B. N/A Other: _____

BIRTH CERTIFICATES/CITIZENSHIP PAPERS/PASSPORT

Home Office S.D.B. N/A Other: _____

SOCIAL SECURITY DOCUMENTS

Home Office S.D.B. N/A Other: _____

MARRIAGE DOCUMENTS

Home Office S.D.B. N/A Other: _____

DEEDS AND OTHER REAL ESTATE DOCUMENTS

Home Office S.D.B. N/A Other: _____

INVESTMENTS/STOCKS/BONDS/BANKING

Home Office S.D.B. N/A Other: _____

BUSINESS AGREEMENTS

Home Office S.D.B. N/A Other: _____

OUTSTANDING LOAN/CREDITOR DOCUMENTS

Home Office S.D.B. N/A Other: _____

CREDIT CARDS/PERSONAL VALUABLES

Home Office S.D.B. N/A Other: _____

MILITARY RECORDS

Home Office S.D.B. N/A Other: _____

INSURANCE/BENEFITS DOCUMENTS

Home Office S.D.B. N/A Other: _____

FUNERAL ARRANGEMENTS

Home Office S.D.B. N/A Other: _____

ADVISORS TO CONSULT OR NOTIFY

ACCOUNTANT

Name: _____ Phone: _____

Address: _____

FINANCIAL ADVISOR & COMPANY

Name: _____ Phone: _____

Address: _____

LAWYER

Name: _____ Phone: _____

Address: _____

BANK MANAGER

Name: _____ Phone: _____

Address: _____

EXECUTOR OR TRUSTEE

Name: _____ Phone: _____

Address: _____

LIFE UNDERWRITER

Name: _____ Phone: _____

Address: _____

DOCTOR

Name: _____ Phone: _____

Address: _____

CLERGY

Name: _____ Phone: _____

Address: _____

CHILDREN'S GUARDIAN

Name: _____ Phone: _____

Address: _____

OTHER

Name: _____ Phone: _____

Address: _____



Website: www.pncpa.biz
Norwalk Office: (800) 860-0152
Sandusky Office: (800) 293-2727

