

SFERS provides this form to help members keep track of their important documents. This will help a member or a family member find the member's records quickly when they are needed the most. Members may also want to let their family know about this form, so they can easily access the documents in the event of illness or death. **This form is for personal use only. Do Not Send this form to SFERS**

**PERSONAL: Indicate the location of each document**

Birth Certificate \_\_\_\_\_  
Marriage/Domestic Partnership Certificate \_\_\_\_\_  
Deed/Title to Property \_\_\_\_\_  
Vehicle Title \_\_\_\_\_  
Passport \_\_\_\_\_  
Social Security Card \_\_\_\_\_  
Military Service Record \_\_\_\_\_  
Funeral Arrangements \_\_\_\_\_

**FINANCIAL: Indicate the bank name and account number for each account**

Primary Bank Account \_\_\_\_\_  
Other Bank Account \_\_\_\_\_  
Mortgage \_\_\_\_\_  
Safe Deposit Box/Box Number/Location \_\_\_\_\_  
Tax Records \_\_\_\_\_

**INSURANCE: Indicate the insurance company, address and policy number**

Life Insurance \_\_\_\_\_  
Health Insurance \_\_\_\_\_  
Vehicle Insurance \_\_\_\_\_  
Property Insurance \_\_\_\_\_

**LEGAL: Indicate the location of each document and authorized individual**

Will \_\_\_\_\_  
Trust \_\_\_\_\_  
Power of Attorney \_\_\_\_\_  
Divorce Papers \_\_\_\_\_

**RETIREMENT DOCUMENTS: Indicate the location of each document**

SFERS Beneficiary Designation Form \_\_\_\_\_  
Social Security Records \_\_\_\_\_  
Other Retirement Records \_\_\_\_\_

**OTHER: Indicate the location of each item**

Extra keys to home, vehicle, etc. \_\_\_\_\_  
Safe Deposit Box keys \_\_\_\_\_  
Other \_\_\_\_\_