

Where My Assets Are



One problem survivors face when death occurs is finding documents and valuable papers. You can do your survivors a favor by filling out this form. Give copies to your loved ones, executor, lawyer and anyone else who will need this information. You should review and update this information periodically.

Name _____

Retirement System Registration No. _____ Social Security Number _____

My valuable papers and assets are stored in these locations (address plus where to look)

A. Residence _____

B. Safe-Deposit Box _____

C. Other _____

ITEM	LOCATION:	A	B	C	ITEM	LOCATION:	A	B	C
My will (original)		___	___	___	Retirement plans		___	___	___
Power of attorney		___	___	___	Deferred compensation/IRA		___	___	___
Spouse's will (original)		___	___	___	Titles and deeds		___	___	___
Safe combination		___	___	___	Notes (mortgages)		___	___	___
Trust agreements		___	___	___	List of stored & loaned items		___	___	___
Life insurance		___	___	___	Auto ownership records		___	___	___
Health insurance policy		___	___	___	Birth certificate		___	___	___
Homeowners policy		___	___	___	Military discharge papers		___	___	___
Car insurance policy		___	___	___	Marriage certificate		___	___	___
Employment contracts		___	___	___	Children's birth certificates		___	___	___
Partnership agreements		___	___	___	Divorce/separation records		___	___	___
List of checking/savings accounts		___	___	___	Health care proxy		___	___	___
List of credit cards		___	___	___	Other: _____		___	___	___
Brokerage account records		___	___	___	_____		___	___	___

IMPORTANT NAMES, ADDRESSES AND PHONE NUMBERS

New York State & Local Retirement System, 110 State Street, Albany, NY 12244-0001, or toll-free at 1-866-805-0990 or 518-474-7736, in the Albany, New York area.

Attorney _____

Accountant _____

Insurance Agent _____

Copies Given to _____

Date Prepared _____

NOTE: Please be sure to tell your beneficiaries to contact the Retirement System at the numbers above upon your death to determine what benefits may be due.