

Personal Document Locator

Keep your important information in one place



New York State
Deferred Compensation Plan

A 457(b) Plan for Your Future



Helpful hint:

Review this document each year when you do your taxes.

 nysdcp.com

 1-800-422-8463

Regular financial accounts | List your accounts and other services.

| Financial firm's name/address | Identification number | In whose name |
|-------------------------------|-----------------------|---------------|
| Checking accounts | | |
| | | |
| Savings accounts | | |
| | | |
| Certificates of deposit | | |
| | | |
| Money market certificates | | |
| | | |
| Trust accounts | | |
| | | |
| Safe-deposit boxes | | |
| | | |
| Other | | |
| | | |

Outstanding liabilities | List outstanding loans, home equity lines, mortgage, credit card debt, student loans, etc.

| Type | Creditor/company name | Creditor address | Account number |
|------|-----------------------|------------------|----------------|
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Securities accounts (stocks/bonds/other securities)

| Firm/Asset | Account number | Contact information | In whose name |
|------------|----------------|---------------------|---------------|
| | | | |
| | | | |

Mutual funds

| Company name and fund | Account number | Contact information | In whose name |
|-----------------------|----------------|---------------------|---------------|
| | | | |
| | | | |

Make it easier for your loved ones

In an emergency, your family members need to be able to locate important information and documents quickly. This document locator tool is designed to help you organize that information all in one place. Fill out each section and **keep your booklet in a secure location**, such as a lockbox, home safe, etc. **Be sure to let a loved one or the executor of your estate know where it's stored and how to access it.**



Personal information

Your name:

Birthdate:

Birthplace:

Social Security number:

Current employer:

Address:

Spouse/partner's name:

Birthdate:

Birthplace:

Social Security number:

Current employer:

Family member information

Name/relationship:

Birthdate:

Address/phone number:

Family member information

Name/relationship:

Birthdate:

Address/phone number:

Name/relationship:

Birthdate:

Address/phone number:

Name/relationship:

Birthdate:

Address/phone number:

Name/relationship:

Birthdate:

Address/phone number:

Name/relationship:

Birthdate:

Address/phone number:

Emergency information | The following is a list of information and documents that your family may need quick access to in an emergency.

| Medical information | Location | Phone number |
|---|----------|--|
| Hospital of choice | | |
| Primary doctor | | |
| Other doctor(s) | | |
| Dentist | | |
| Insurance/financial information | Location | Contact/phone number/ policy number |
| Health insurance (or MediGap) policy number | | |
| Medicare, Medicaid or VA cards | | |
| Health care power of attorney/ living will | | |
| Will/trust | | |
| Financial power of attorney | | |
| Health care proxy/living will | | |
| Checkbook and banking information | | |
| Funeral information | Location | Contact/phone number |
| Prepaid funeral arrangements | | |
| Cemetery plot and number | | |
| Preferred clergy/family advisor | | |
| Church | | |
| Special/other instructions | | |

Retirement accounts

| Account type | Account number | Financial institution/trustee | Phone number | Beneficiary name(s) |
|--|----------------|-------------------------------|------------------------------|---------------------|
| New York State Deferred Compensation Plan (NYSDCP) | | | 1-800-422-8463 nysdcp.com | |
| Traditional IRAs | | | | |
| Roth IRAs | | | | |
| 401(k), 403(b) or other employer-sponsored plans | | | | |
| Keogh, SEP or SIMPLE | | | | |
| Pension | | | | |
| Social Security | | | ssa.gov 1-800-772-1213 | |
| Other retirement investments | | | | |

Education accounts

| Account type | Account number | Financial institution/trustee | Phone number | Beneficiary name(s) |
|-------------------------------|----------------|-------------------------------|--------------|---------------------|
| Education IRA/Coverdell ESA | | | | |
| 529 qualified tuition plan(s) | | | | |
| Custodial account(s) | | | | |
| Other | | | | |

Family advisors || List your personal and business advisors.

| Type of advisor | Name | Phone number | Address |
|--------------------------------------|------|--------------|---------|
| Accountant/tax preparer | | | |
| Executor of estate | | | |
| Attorney | | | |
| Banker | | | |
| Financial planner/investment advisor | | | |
| Insurance agent(s) | | | |
| Company benefits administrator | | | |
| Other | | | |

Valuable papers || The exact location of valuable papers is key. Under "Location," clearly describe where — desk, drawer, closet, safe-deposit box, etc. — you keep your valuable papers.

| Document type | Location |
|--|----------|
| Marriage license/family birth certificates | |
| Deed(s) to real estate | |
| Property improvement records | |
| Mortgage papers/title | |
| Mortgage payment receipts | |
| Homeowners insurance policies | |
| Motor vehicle insurance policies | |
| Motor vehicle title(s) | |
| Other property | |
| Passports | |
| Military service papers | |

Life insurance

| Person insured | Type | Face value | Policy number | Beneficiary name(s) | Insurance company |
|----------------|------|------------|---------------|---------------------|-------------------|
| | | | | | |
| | | | | | |
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Annuities

| Person insured | Type | Face value | Policy number | Beneficiary name(s) | Insurance company |
|----------------|------|------------|---------------|---------------------|-------------------|
| | | | | | |
| | | | | | |
| | | | | | |

Disability insurance

| Person insured | Type | Face value | Policy number | Beneficiary name(s) | Insurance company |
|----------------|------|------------|---------------|---------------------|-------------------|
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Digital information

So much of what we do today is online. Providing access to your digital accounts can help save your family members or executor time and hassle. Be sure to update this section frequently, especially the passwords.

Security codes

| Type | Security code/password |
|-------------------|------------------------|
| Personal computer | |
| Laptop | |
| Tablet | |
| Cellphone | |
| Voicemail | |
| Home alarm | |
| Other | |

Digital accounts

| Account type | Username | Password | How account should be handled (e.g., closed, "friends/followers" notified) |
|---|----------|----------|---|
| Personal/business email accounts | | | |
| | | | |
| | | | |
| | | | |
| Personal/business social media accounts | | | |
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