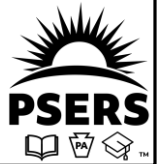


5 N 5th Street
 Harrisburg PA 17101-1905
 Toll-free: 1.888.773.7748
 www.psers.pa.gov
 Fax: 717.772.3860
 PSRS-1012 (07/2019)

Vital Papers and Other Important Information



Usually one or the other of a couple takes responsibility for paying bills and keeping the family paperwork in order. If that person is suddenly removed from the picture, the confusion over these matters can add to the hardship of the survivor. To avoid this confusion, it helps to have all your important papers organized or at least know where they are. The following pages are designed to that end and to assist you in keeping your important papers up-to-date.

Name	Social Security Number
-------------	-------------------------------

1. WILL

- a) Where is it?
 (yours) _____ (your spouse's) _____
- b) Who has copies? _____
- c) When was it last updated?
 (yours) _____ (your spouse's) _____
- d) Who is executor or executrix?
 (yours) _____ (your spouse's) _____
- e) Who is named as guardian of children, if any? _____

2. LIFE INSURANCE

a)

Company	Policy Number(s)	On Whom	Beneficiary(ies)	Agent

- b) Where are the policies? _____

3. HEALTH INSURANCE

a)

Company	Policy Number(s)	Who is Covered	Payment Due	Agent

- b) Where are the policies? _____

4. AUTOMOBILE INSURANCE

a)

Company	Policy Number(s)	Payment Due	Agent

b) Where are the policies? _____

5. LIABILITY AND PROPERTY INSURANCE

a)

Company	Property Insured	Policy Number(s)	Payment Due	Agent

b) Where are the policies? _____

6. BIRTH CERTIFICATES

Whose	Where Located	Who Has Copy

7. MARRIAGE LICENSE

a) Where is it located? _____

b) Where are the copies kept? _____

8. TITLES AND DEEDS TO PROPERTY

a) House:

1) Where is the original? _____

2) Where are the copies kept? _____

b) Car(s):

1) Where is the original? _____

2) Where are the copies kept? _____

8. TITLES AND DEEDS TO PROPERTY (continued)

c) Other Property or Real Estate:

- 1) List individually _____

- 2) Where is the original? _____
- 3) Where are the copies? _____

9. MILITARY RECORDS

- a) Where are the originals? _____
- b) Where are the copies? _____

10. BANK RECORDS

Name and Address of Bank or Other Institution	Type of Account	Account Number	Names on Account	Location of Records

11. SAFE DEPOSIT BANK

Name and Address of Institution	Box Number	Who Has Access	Location of Keys

12. VALUABLES

Description	Appraised Value	Serial Number	Location

13. INVESTMENTS

Type	ID Number	In Whose Name	Location of Papers

14. DEBTS

Type	Owed to Whom	Payments	Due Date	Paid Off When

15. CREDIT CARDS AND CHARGE ACCOUNTS

Name of Card or Store	ID Number	If Card is Lost or Stolen, Contact	Card is Under Names of

16. TAX RETURNS

Where are they located? _____

17. NAMES, ADDRESSES AND PHONE NUMBERS OF PROFESSIONAL ADVISORS

a) Doctors

Name	Address	Phone Number

b) Dentists

Name	Address	Phone Number

17. NAMES, ADDRESSES AND PHONE NUMBERS OF PROFESSIONAL ADVISORS (continued)

c) Lawyers

Name	Address	Phone Number

d) Insurance Agents

Name	Address	Phone Number

e) Tax Consultant

Name	Address	Phone Number

f) Accountant

Name	Address	Phone Number

g) Broker

Name	Address	Phone Number

h) Clergy

Name	Address	Phone Number