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## PERSONAL DOCUMENT LOCATOR

■ **Important** – This form is not intended for legal or KPERS purposes. Please do not send this form to KPERS. It is provided as a courtesy to our members, and is intended to be a helpful tool for use at home to organize your financial and personal records. Be sure to keep it in a secure location. For more information on using this locator, see page 4.

### ■ Part A – Personal Information

- |  |                            |
|--|----------------------------|
| 1. Social Security Number: _____ - _____ - _____ | 2. Name: _____             |
| 3. Residence: _____                              | 4. City, State, Zip: _____ |
| 5. Date of Birth: _____                          | 6. Place of Birth: _____   |

■ **Part B – Location Key** – Name the locations where you keep your documents. These location numbers are repeated in the middle column on the next pages. Circle the number for the correct location next to each item.

- Location 1: \_\_\_\_\_
- Location 2: \_\_\_\_\_
- Location 3: \_\_\_\_\_
- Location 4: \_\_\_\_\_

### ■ Part C – Personal Advisors and Contacts

- |                                 |                     |
|---------------------------------|---------------------|
| <b>Insurance Agent:</b> _____   | Company: _____      |
| Address: _____                  | Phone Number: _____ |
| <b>Insurance Agent:</b> _____   | Company: _____      |
| Address: _____                  | Phone Number: _____ |
| <b>Tax Preparer:</b> _____      | Firm: _____         |
| Address: _____                  | Phone Number: _____ |
| <b>Attorney:</b> _____          | Firm: _____         |
| Address: _____                  | Phone Number: _____ |
| <b>Physician:</b> _____         | Office: _____       |
| Address: _____                  | Phone Number: _____ |
| <b>Financial Advisor:</b> _____ | Company: _____      |
| Address: _____                  | Phone Number: _____ |
| <b>Clergy:</b> _____            | Church: _____       |
| Address: _____                  | Phone Number: _____ |
| <b>Other:</b> _____             | Location: _____     |
| Address: _____                  | Phone Number: _____ |
| <b>Other:</b> _____             | Location: _____     |
| Address: _____                  | Phone Number: _____ |
| <b>Other:</b> _____             | Location: _____     |
| Address: _____                  | Phone Number: _____ |

**Part D – Important Documents**

Document	Location (from Part B)	Other information/Who to contact
<b>Personal Papers</b>		
My Will (original)	1 2 3 4 _____	_____
Spouse's Will	1 2 3 4 _____	_____
Trust Agreements	1 2 3 4 _____	_____
Power of Attorney	1 2 3 4 _____	_____
Living Will/Medical POA	1 2 3 4 _____	_____
Birth Certificate	1 2 3 4 _____	_____
Social Security Card	1 2 3 4 _____	_____
Marriage Certificate	1 2 3 4 _____	_____
Divorce/Separation Papers	1 2 3 4 _____	_____
Adoption Papers	1 2 3 4 _____	_____
Military Papers	1 2 3 4 _____	_____
Family Death Certificates	1 2 3 4 _____	_____
Employment Record	1 2 3 4 _____	_____
_____	1 2 3 4 _____	_____
_____	1 2 3 4 _____	_____
_____	1 2 3 4 _____	_____
_____	1 2 3 4 _____	_____
<b>Property Papers</b>		
Vehicle Titles	1 2 3 4 _____	_____
Property Deeds	1 2 3 4 _____	_____
Safe Deposit Box/Keys	1 2 3 4 _____	_____
Appraisals	1 2 3 4 _____	_____
Safe Combination	1 2 3 4 _____	_____
_____	1 2 3 4 _____	_____
_____	1 2 3 4 _____	_____
_____	1 2 3 4 _____	_____
_____	1 2 3 4 _____	_____
<b>Financial Papers</b>		
Bank Accounts	1 2 3 4 _____	_____
Credit Card Accounts	1 2 3 4 _____	_____
Home and Property Loans	1 2 3 4 _____	_____
_____	1 2 3 4 _____	_____
_____	1 2 3 4 _____	_____
_____	1 2 3 4 _____	_____

Document

Location (from Part B)

Other information/Who to contact

**Insurance Policies**

Home 1 2 3 4 \_\_\_\_\_

Health 1 2 3 4 \_\_\_\_\_

Vehicle 1 2 3 4 \_\_\_\_\_

\_\_\_\_\_ 1 2 3 4 \_\_\_\_\_

\_\_\_\_\_ 1 2 3 4 \_\_\_\_\_

\_\_\_\_\_ 1 2 3 4 \_\_\_\_\_

**Retirement and Life Insurance**

KPERS Benefit Information 1 2 3 4 \_\_\_\_\_

IRAs, 401(k), 457, 403(b) 1 2 3 4 \_\_\_\_\_

Life Insurance 1 2 3 4 \_\_\_\_\_

Social Security 1 2 3 4 \_\_\_\_\_

\_\_\_\_\_ 1 2 3 4 \_\_\_\_\_

\_\_\_\_\_ 1 2 3 4 \_\_\_\_\_

\_\_\_\_\_ 1 2 3 4 \_\_\_\_\_

**Other**

Important Keys 1 2 3 4 \_\_\_\_\_

Antiques and Heirlooms 1 2 3 4 \_\_\_\_\_

Jewelry 1 2 3 4 \_\_\_\_\_

Cash 1 2 3 4 \_\_\_\_\_

Funeral Arrangements 1 2 3 4 \_\_\_\_\_

\_\_\_\_\_ 1 2 3 4 \_\_\_\_\_

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\_\_\_\_\_ 1 2 3 4 \_\_\_\_\_

## ■ Financial Affairs: Organizing for the Unexpected

*John and Dianne spend their winters in Arizona after retiring. John lost his wallet one day while golfing. He thought the phone numbers to cancel his credit cards were in a desk drawer at their Kansas residence. A phone call to his son initiated an hour-long search before the documents were finally located in a closet.*

*After her husband died of a heart attack, Ann was overwhelmed with the sudden responsibility of managing the family's money and household business. Jim had always taken care of the mortgage, life and medical insurance, and his pension. On top of her grieving and the funeral arrangements, she simply didn't know where he kept important documents, what bills needed to be paid, or how to receive survivor benefits from Jim's retirement.*

Each of these scenarios are purely fictional, but are entirely possible. An important part of planning for future events is coordinating your financial affairs with a trusted loved one. Conducting normal business or handling unexpected situations can be much simpler if you plan ahead. Organizing your personal and financial records is the first step. This can also be useful for budgeting and making investment decisions during retirement and later, in planning your estate.

### **Make a list of important documents and valuables**

Develop your own personal record that lists the locations of your important documents, policies, contacts and property. This can be an important tool to you, your family or power of attorney, and eventually, the executor of your estate. For a helpful form to get you started, fill out this printable Document Locator.

### **Educate your spouse or beneficiary about KPERs**

Your spouse or beneficiary should know your retirement benefits as well as you do. They need to know what survivor and death benefits they are entitled to receive if you die. The Retirement System does not know you've had a major life event unless you tell us. Beneficiary and survivor benefits must be applied for, and your loved ones need to know what steps to take. Read the membership guide together or browse the KPERs website and make a list of steps to take in case of an unexpected life event.

### **FAQs about using the Document Locator**

*How do I use the document locator?* The Document Locator can be a handy tool to help you organize your important documents, property and contacts. You can use it for your own personal organization or provide it to a few trusted family members, your lawyer or your power of attorney to have in case of an emergency. Make certain it is always kept in a safe place to protect your personal information.

*What is an important document?* This answer may be different for every person. The items listed on the Document Locator can serve as a guide to help you decide what is important for you. There are numerous blank spaces provided so you can personalize your list.

*What is the location key?* This feature on page one lets you decide on several primary locations to keep your documents and code them with a number. These numbers are repeated in the middle column on each page. Simply circle the number next to each item. There is also a blank space provided so you can name a different location.