

Important Documents & Asset Locator Index

How to Use This Template

Download, print, or complete digitally

Save the template to your device or print a copy to fill in by hand.

Record key document locations

Fill in where important personal, legal, and financial documents are kept. Include your Will, living Will, ID, passport, marriage certificate, title deeds, and vehicle papers.

Provide a high-level asset overview

List properties, investments, businesses, or shareholdings. Include addresses, approximate values, and bond providers where applicable.

Document digital storage locations

If you store scanned documents on cloud services, external drives, or other digital platforms, indicate where these files are kept. Do **not** include passwords in shared copies, store those securely elsewhere.

Include safe or lockbox information

Note the location of any safes or lockboxes, and where spare keys or combinations are recorded. **Do not write actual codes in copies meant for others.**

Add notes for your executor or family

Include any extra guidance that will help trusted individuals locate documents or access assets quickly when needed.

Store securely and share wisely

Keep the completed form in a secure place. Share it only with your executor, spouse, or other trusted persons who may need to act on your behalf.

Update regularly

Review and update the information whenever you acquire new assets, documents, or make changes to storage locations.

DISCLAIMER:

This Important Documents & Asset Locator Index is provided by **Bilnor Staffing Solutions** for personal planning purposes only. It is **not a legally binding document**, and Bilnor Staffing Solutions is **not responsible for any errors, omissions, or outdated information** entered by the user. Please store this document securely and share it only with trusted individuals.

1. Where to Find My Key Documents

Will location:	
Living Will location:	
ID & Passport:	
Marriage certificate / divorce order:	
Title deeds:	
Vehicle registration papers:	

2. Asset Overview (High Level)

Properties owned (address, approximate value, bond provider):

Investments (brief list):

Businesses / shareholdings:

3. Digital Document Storage

If using cloud or external drives, describe where important scanned documents are stored:

4. Safe / Lockbox Information

Location of any safe / lockbox:

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Where spare keys / combinations are recorded (do NOT write the actual code in shared copies):

5. Notes for Executor / Family

Any extra guidance to help them find assets and documents quickly:
