PERSONAL

DOCUMENT LOCATOR

SEPHTON FINANCIAL

WIDOW & WISDOM™

Sephton Financial, LLC

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PERSONAL DOCUMENT LOCATOR

Please keep in a secure location

This Personal Document Locator is simply a detailed list of where you store your important records and papers and who your primary advisors and contacts are. This list will assist your loved ones in the event of your death or disability. Keep this list at home along with your other important documents, and make sure a trusted family member knows where it is, or provide a copy to the family member, your executor, and/or your attorney. Remember to update your Personal Document Locator at least once a year to ensure its accuracy.

PART A -- PERSONAL INFORMATION

Name (First, Middle Last)

Street Address

City, State, Zip

Social Security Number

Date of Birth

Place of Birth

NOTES:

PART B -- PERSONAL CONTACTS

ATTORNEY

Name

Firm Name

Street Address

City, State, Zip

Phone Number(s)

TAX PREPARER

Name

Firm Name

Street Address

City, State, Zip

Phone Number(s)

INSURANCE AGENT

Name

Company Name

Street Address

City, State, Zip

Phone Number(s)

FINANCIAL ADVISOR

Name

Company Name

Street Address

City, State, Zip

Phone Number(s)

PART B CONTINUED -- ONLINE ACCOUNTS

WEBSITE	USERNAME	PASSWORD

NOTES:

PART C -- LOCATION KEY

Specify the location(s) where you keep your documents (e.g., home, office, safe, safe-deposit box). For each item in Part D, check the number that corresponds to the correct location.

Location 1

Location 2

Location 3

Location 4

Location 5

Location 6

PART D -- IMPORTANT DOCUMENTS

PART D -- IMPORTANT DOCUMENTS	1	2	3	4	5
Will					
Durable Power of Attorney					
Health-Care Directives					
Trust Agreements					
Birth Certificate					
Social Security Card					
Marriage Certificate					
Military Papers					
Divorce/Separation Papers					
Vehicle Titles					

PART D -- IMPORTANT DOCUMENTS	1	2	3	4	5
Deeds					
Safe-Deposit Box/Keys					
Bank Account Records (e.g., checking and savings accounts, CDs)					
Tax Returns					
Mortgage and Loan Papers					
Insurance Policies -- Home and Vehicles					
Insurance Policies -- Property and Casualty					
Insurance Policies -- Life					
Insurance Policies -- Health					
Business Papers (e.g., incorporation papers, trademarks, patents)					
Retirement Account Papers (e.g., IRAs, annuities)					
Investment Papers (e.g., securities, stocks, bonds, mutual funds)					
Proof of Citizenship					
Important Keys					
Antiques and Heirlooms					
Jewelry					
Cash					
Funeral Instructions (e.g., cemetery plot deed, burial instructions)					

NOTES:

IMPORTANT DISCLOSURES:

Registered Representative offering securities through Cetera Financial Specialists LLC, member FINRA/SIPC. Advisory services are offered through Cetera Investment Advisers LLC. Cetera is under separate ownership from any other named entity. Sephton Financial, LLC and Cetera are not affiliated.

Individuals affiliated with Cetera firms are either Registered Representatives who offer only brokerage services and receive transaction-based compensation (commissions), Investment Adviser Representatives who offer only investment advisory services and receive fees based on assets, or both Registered Representatives and Investment Adviser Representatives, who can offer both types of services.

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