

WHERE MY ASSETS ARE

One problem survivors often have is finding documents and valuable papers. You can assist them by filling out this form. Give copies to your loved ones, executor, lawyer and anyone else who will need this information. You should review and update this information periodically.

Name _____ Social Security Number _____

NYSLRS ID No. _____ NYSLRS Registration No. _____

My valuable papers and assets are stored in these locations (address plus where to look)

A. Residence _____

B. Safe Deposit Box _____

C. Other _____

ITEM	LOCATION: A	B	C	ITEM	LOCATION: A	B	C
My will (original)	___	___	___	Retirement plans	___	___	___
Power of attorney	___	___	___	Deferred compensation/IRA	___	___	___
Spouse's will (original)	___	___	___	Titles and deeds	___	___	___
Safe combination	___	___	___	Notes (mortgages)	___	___	___
Trust agreements	___	___	___	List of stored and loaned items	___	___	___
Life insurance	___	___	___	Auto ownership records	___	___	___
Health insurance policy	___	___	___	Birth certificate	___	___	___
Homeowner's policy	___	___	___	Military discharge papers	___	___	___
Car insurance policy	___	___	___	Marriage certificate	___	___	___
Employment contracts	___	___	___	Children's birth certificates	___	___	___
Partnership agreements	___	___	___	Divorce/separation records	___	___	___
List of checking/savings accounts	___	___	___	Health care proxy	___	___	___
List of credit cards	___	___	___	Other: _____	___	___	___
Brokerage account records	___	___	___	_____	___	___	___

Important Names, Addresses and Phone Numbers

New York State and Local Retirement System, 110 State Street, Albany, NY 12244-0001, or toll-free at 1-866-805-0990 or 518-474-7736, in the Albany, New York area.

Attorney _____

Accountant _____

Insurance Agent _____

Copies Given to _____

Date Prepared _____

Note: Please be sure to tell your beneficiaries to notify NYSLRS upon your death to determine what benefits may be due.

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