



Where to Find My Important Papers

A copy of this list should be given to the person who would handle your legal and financial matters should you become incapacitated. You should review and update this information periodically.

_____	_____	_____
Name	OPERS Member ID	Social Security Number
_____	_____	_____
Spouse/Partner name	OPERS Member ID	Social Security Number

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

A. Residence _____

B. Safe Deposit Box _____

C. Other _____

<u>DOCUMENT</u>	<u>LOCATION</u>	<u>DOCUMENT</u>	<u>LOCATION</u>
My will (original)	_____	List of important friends/neighbors	_____
Spouse's will (original)	_____	Employment contracts	_____
Power of attorney	_____	Partnership agreements	_____
Advance health directive/living will	_____	Titles and deeds	_____
Health care proxy	_____	Notes (mortgages)	_____
Trust agreements	_____	List of stored & loaned items	_____
Funeral arrangements	_____	Auto ownership records	_____
Life insurance policy(s)	_____	Birth certificate	_____
Health insurance policy(s)	_____	Spouse's birth certificate	_____
Long-term care insurance policy(s)	_____	Marriage certificate	_____
Homeowner/rental policy(s)	_____	Divorce/separation records	_____
Car insurance policy	_____	Children's birth certificates	_____
List of checking & savings accounts	_____	Military/veteran's papers	_____
List of credit cards	_____	Safe combination	_____
Brokerage account records	_____	Safe deposit box key	_____
OPERS retirement papers	_____	Passwords (computer, cell phones)	_____
SoonerSave, IRA, 401k papers	_____	Other: _____	_____
Copies of beneficiary forms	_____	Other: _____	_____

Important Names, Addresses and Phone Numbers

Doctor(s): _____

Clergy: _____

Attorney: _____

Accountant: _____

Other contacts: _____

Date Prepared: _____ Copies given to: _____

Note: Beneficiaries should notify OPERS upon your death to determine what benefits may be due.