Corbenic Partners
1525 Valley Center Parkway
Suite 310
Bethlehem, PA 18017
610-814-2474
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Personal Document Locator

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 Code
Social Security Number
Date of Birth
Place of Birth

CORBENIC PARTNERS

Part B -- Personal Contacts

Attorney	
Name	Firm Name
Address	City, State, ZIP
Phone Number(s)	
Tax Preparer	
Name	Firm Name
Address	City, State, ZIP
Phone Number(s)	
Insurance Agent	
Name	Company Name
Address	City, State, ZIP
Phone Number(s)	
Financial Advisor	
Name	Company Name
Address	City, State, ZIP
Phone Number(s)	

Part B continued -- Online Accounts		
Website Address (URL)	**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

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					
Adoption Papers					

Part D continued	1	2	3	4	5
Divorce/Separation Papers					
Vehicle Titles					
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

Please remember that past performance may not be indicative of future results. Different types of investments involve varying degrees of risk, and there can be no assurance that the future performance of any specific investment, investment strategy, or product (including the investments and/or investment strategies recommended or undertaken by Concannon Wealth Management, LLC), or any non-investment related content, made reference to directly or indirectly in this presentation will be profitable, equal any corresponding indicated historical performance level(s), be suitable for your portfolio or individual situation, or prove successful. Due to various factors, including changing market conditions and/or applicable laws, the content may no longer be reflective of current opinions or positions. Moreover, you should not assume that any discussion or information contained in this presentation serves as the receipt of, or as a substitute for, personalized investment advice from Concannon Wealth Management, LLC. To the extent that a reader has any questions regarding the applicability of any specific issue discussed above to his/her individual situation, he/she is encouraged to consult with the professional advisor of his/her choosing. Concannon Wealth Management, LLC is neither a law firm nor a certified public accounting firm and no portion of the presentation content should be construed as legal or accounting advice. A copy of the Concannon Wealth Management, LLC's current written disclosure statement discussing our advisory services and fees is available for review upon request.

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