**LOCATION OF VITAL DOCUMENTS**

Ideally your vital documents should be maintained in a single place, however, that is not always possible or practical. The following chart should be used to help your survivors find the information they will need.

If your documents are held in a safe deposit box, you need to know that access will be restricted upon the death of one or both joint account holders.

A copy of the death certificate must be presented to a bank employee which will allow for the removal of only :

* + The will
  + Insurance policies
  + Cemetery plot ownership certificate

This must be done in the presence of a bank employee and upon signing a waiver form. All remaining documents must be inventoried by the Surrogate’s Office before removal.

If you have important data on computer files, be sure to indicate how to access the data.