# RECORD OF IMPORTANT FAMILY PAPERS

Personal and Financial Records

## **Contents**

This booklet can help you find Family Information (Page 1) important papers quickly. Family Records Power of Attorney It can help others find your Close Relatives or Friends papers in an emergency. Family Advisors It can provide helpful information Location of Your Valuable Papers (Pages 2 & 3) in case records are lost or Wills and Instructions destroyed. Personal Papers **Business Papers** Fill out each form as completely Personal Property Papers and accurately as necessary for Real Estate Papers your needs. Each family is different. Some want more detail Insurance (Pages 4 & 5) than others. Health, Accident, Disability and Hospital Insurance Life Insurance Keep this booklet in an Homeowners, Auto and Other Property Insurance easy-to-find place in your permanent home file. Retirement Plans (Page 5) Keep your records up to date by Checking and Savings (Page 6) checking at least once a year. Credit and Charge Cards (Page 7) Date completed Real Estate Record (Page 8) Date(s) revised\_\_\_\_\_ Government Bonds (Page 9) Municipal and Corporate Bonds (Page 9) Mutual Funds (Page 10) Stocks (Page 11) Debts Outstanding (Page 12)

Money Owed the Family (Page 12)



### FAMILY RECORDS

### FAMILY ADVISORS

Name	Date of Birth	County Where Birth is Recorded	Name	Address - Phone Number
2 0 3	bitti	Dittil is Recorded	The second secon	radicas - Front Flamber
Husband			Clergy	
Wife			Doctor(s)	*
Children				
			Accountant	
			Banker(s)	
			^	
			Broker(s)	
POWER OF	ATTORNEY			
If you have given someone the written lega you unable to handle your own affairs, ind	I power to act for yo icate below.	u in case conditions make		14
Name	Address - Phone	Number	Insurance Agent(s)	
			Lawyer	
CLOSE RELATIV			Financial Advisor	
List those persons who should be notified			Executor or Trustee of Will	
Name	Address - Phone	Number	Executor or trustee of will	
			Employee Fringe Benefits Office	

# **Location of Your Valuable Papers**

Being able to find your valuable papers quickly is vital to you and your survivors. Under location, clearly identify the specific desk and drawer, closet, box, etc. Check  $(\nu)$  actual location or write in location.

	Home File	Safe Deposit Box	Billfold	Other	11	Home File	Safe Deposit Box	Billfold	Other
WILLS AND INSTRUCTIONS					BUSINESS PAPERS				
Husband's Will					Contract Papers				20
Wife's Will					Patents, Copyrights				
Copies of Wills						40			
Funeral Directions, cremation, burial					PERSONAL PROPERTY PAPERS				
Memorial Society membership					Insurance Policies				
Special letters of instruction					Health				
Deed to Cemetery					Life				
					Property				
					Stock or Bond Certificates	12			
					Savings Bonds				
PERSONAL PAPERS					Automobile Title and Bill of Sale				
Birth Certificates					Automobile Registrations				
Baptismal Certificates				13	Safe Deposit Box Key				
Marriage Certificates					Income Tax Records				
					Cancelled Checks and Stubs				
									_

	Home File	Safe Deposit Box	Billfold	Other		Home File	Safe Deposit Box	Billfold	Other
Adoption Certificates					Inventory of Household Goods				
Divorce Certificates					Appliance Warranties				
Death Certificates					Appliance Instruction Books				
Naturalization Papers									
Diplomas									
Passports						_			
Social Security Cards									
Employment Records					REAL ESTATE PAPERS				
					Deed to your House		-		
Armed Forces Records					Deed to Other Real Estate				
Family Health Records					Mortgage Papers				
					Mortgage Payment Receipts				
					Easements and Rights of Way				
					Rental Property				

# **Insurance**

### HEALTH, ACCIDENT, DISABILITY, AND HOSPITAL INSURANCE

Name(s) of Insured	Policy Number	Company, Address	Type of Insurance	Agent Name, Address

### LIFE INSURANCE

Policy Number	Company, Address	Face Value	Type of Policy	Beneficiary(s)	Amount of Loan Against Policy	Agent Name, Address
					-	
	Policy Number	Policy Number Company, Address	Policy Number Company, Address Face Value	Policy Number Company, Address Face Value Type of Policy	Policy Number Company, Address Face Value Type of Policy Beneficiary(s)	

### HOMEOWNERS, AUTO, AND OTHER PROPERTY INSURANCE

Property Insured, Type of Coverage	Policy Number	Company, Address	Amount	Agent Name, Address
-,-,-	-			
	1			

Retirement Plans (Pensions, annuities, IRAs, Keoghs, and employee plans)

For Whom	Type of Plan	Name of Institution	Amount Invested	Date	Identification Number
TOT WHOTE	Type or those	7100110			
				*	
		y:			

# **Checking and Savings**

Checking and share draft accounts, savings and share accounts, certificates of deposit, money market accounts and money market mutual funds.

In Whose Name	Type of Account	Name and Address of Firm	Account Number	Maturity Date (if applicable
	1.0			
		17		
				×

# Credit and Charge Cards

Name(s) on Card	Card Number	Issuer	If Lost or Stolen, NOTIFY:
names) on Card	Card Transect		Phone:
			Phone: Address:
			Phone: Address:
			Phone: Address:
			Phone:
			Phone:
			Phone: Address:
	Name(s) on Card	Name(s) on Card Card Number	Name(s) on Card Card Number Issuer

# **Real Estate Record**

					Payments					
Owner(s)	Location	Purchased Date Price		Present Market Value	Principal and Interest	Escrow Account	Monthly Payment Date	Final Payment Date		
cription of Major Improve	ements				Date	Loca	tion	Cost		
			10							
						_				
								ş.		

# **Government Bonds**

Savings bonds, Treasury bonds

	Serial Number	Purc	hase	Mat	urity	Beneficiary
Owner(s)	Number	Price	Date	Date	Value	

**Municipal and Corporate Bonds** 

				Maturity Date	Face Value	Interest Rate	Coupo Due Dates	
Issuer	number	Date Frice		Date	value	Nate	Dates	
				_				
	Issuer	Codel					Serial Number Date Price Maturity Face Interest Rate	

# **Mutual Funds**

List each mutual fund owned by the family.

61	12	977 327 33 527 33		Shares Purchased	
Owner(s)	Company	Identification Number	Date	Number	Price
*					
				LU LU	
12					
		0			
	<u></u>				
				1	
				1	



			Shares Purchased		
Owner(s)	Company	Certificate Number	Date	Number	Price Per Share
		3.5			

**Debts Outstanding** 

Company or Person Owed	Address	Amount	Payment	Payment Due Date	Final Payment Di
		wed the F			
Person Owing Family	Money O	wed the F	amily Date Due	How and	When Payable
Person Owing Family				How and	When Payable
Person Owing Family				How and	When Payable
Person Owing Family				How and	When Payable
Person Owing Family				How and	When Payable
Person Owing Family				How and	When Payable
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Person Owing Family				How and	When Payable
Person Owing Family				How and	When Payable
Person Owing Family				How and	When Payable
Person Owing Family				How and	When Payable
Person Owing Family		Amount		How and	When Payable
Person Owing Family				How and	When Payable
Person Owing Family		Amount		How and	When Payable

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