Record of Important Family Papers

Personal and Financial Records

Published by Michigan State University Children, Youth and Family Programs Family Resource Management Area of Expertise

Extension Bulletin E-451

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Introduction and Contents

This booklet can...

- . Help you find important papers quickly.
- · Help others find your papers in an emergency.
- · Provide critical information in case records are lost or destroyed.

Instructions for keeping and using records

- Fill out each form to the extent that meets your needs. Each family is different. Some want more detail than others. Add pages if necessary.
- Write in pencil. Review and update the information in this booklet at least once each year.
- Think of this booklet as a summary. Be sure to develop an accompanying filing system with detailed information and support documents for each topic.
- Keep this booklet in an easy-to-find place in your permanent home file.
 In addition, give a copy to a close relative or friend and place one in your safe deposit box.

Date record book completed:

Date(s) revised:	

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Family Information

Family Member Data

Name	Date of Birth	Place of Birth	Social Security Number	Address	Phone, E-mail	Employer, Phone
Husband					()	
						()
Wife					()	
						()
Children					()	
						()
					()	
						()
					()	
						()

Family Advisers and Designees

	Name	Address	Phone	Fax
Accountant/tax preparer			()	()
Attorney			()	()
Banker			()	()
Broker			()	()
Care providers			()	()
Clergy			()	()
Dentist			()	()

Family Information, continued

	Name	Address	Phone	Fax
Employer fringe benefit office			()	()
Financial adviser			()	()
			()	()
Insurance agents			()	()
			()	()
			()	()
Power of attorney for property			()	()
Power of attorney for health care			()	()
Personal representative for will			()	()
Physicians			()	()
			()	()
			()	()
			()	()
Veterinarian			()	()

Family Emergency Contacts

Name	Address	Relationship	Phone	E-mail
			()	
			()	
			()	
			()	

Location of Important Family Records

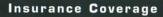
		Home file (🗸)	Safe deposit ()</th <th>Wallet (✔)</th> <th>Other (✓)</th>	Wallet (✔)	Other (✓)
	nstructions, rectives, trusts				
Husband's v	will/trust				
Wife's will/tre	ust				
Copies of w	ills/trusts				
Living will/pr	ower of attorney - health care				
Funeral and	burial instructions				
Special lette	ers of instruction				
Personal pa	apers				
Armed force	es records				
Certificates:	Baptismal				
	Birth/adoption				
	Death				
	Divorce				
	Marriage				
Diplomas					
Education re	ecords				
Employment	records				
Health recor	ds				
Pet/animal re	ecords				
Retirement p	olan records				
Business p	apers				
Contract pa	pers				
Patents/cop	yrights				
Miscellane	ous				
Safe deposit	t box key				
Power of atte	orney - property				
Credit card					

		Home file (🗸)	Safe deposit (🗸)	Wallet (✔)	Other (✓)
Insurance policies:	Health-related Life Motor vehicle Home/liability				
	and savings accounts				
	maries ecks/bank statements and blank checks				
Investment	ts				
Stock, bond a	and mutual fund files				
Stock, bond a	and mutual fund certificates				
Income tax	returns and records				
Real estate	e/property				
Deed: Home Othe Buria	r real estate				
	pers & payment receipts nd rights-of-way				
Property tax r	records				
Rental proper					
	nousehold goods				
Appliance wa					
Owner's man	uals				
Motor vehi	cles				
Titles and bill	s of sale				
Registrations					

Credit, Debit and Charge Cards

Card Name/Type	Name(s) on Account	Account Number	No. of Cards	If Lost or Stolen, NOTIFY:
				Bank/Company Name
				Phone_()
				Bank/Company NameAddress
				Phone_()
				Bank/Company NameAddress
				Phone_()
				Bank/Company Name Address
				Phone ()
				Bank/Company NameAddress
				Phone ()
				Bank/Company NameAddress
				Phone_()
				Bank/Company Name
				Phone ()

E



Health, Accident, Disability, Long-term Care and Hospital Insurance

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

Insurance Coverage, continued

Homeowners, Auto, Liability and Other Property Insurance

Retirement Accounts

Pensions, Annuities, IRAs, Keoghs, 401(k), 403(b), Profit Sharing, etc.

Type of Plan	For Whom	Name of Provider	Contact Person	Date Started	Identification Number



Savings, Checking and Share Accounts, Certificates of Deposit, Money Market Accounts and Money Market Mutual Funds

Owner/In Whose Name	Type of Account	Financial Institution, Address and Phone	Account Number	Maturity Date (if applicable)

Notes:	

Government Bonds

Savings Bonds, Treasury Bonds

		Purch		Ma	turity	-
Owner(s)	Serial Number	Price	Date	Date	Value	Beneficiary
		1 1				
		_				

Municipal and Corporate Bonds

Owner(s)	Issuer	Serial Number	Purchase Date Price	Maturity Date	Face Value	Interest Rate	Coupon Due Dates

Mutual Funds

	Owner(s)			Shares Pu	rchased	Dividend Instructions		
Company		Account Number	Date	Number	Price per Share	Automatic Reinvest	Distribu	

Stocks

	Owner(s)			Shares Pu	rchased	Dividend Instructions		
Company		Certificate Number	Date	Number	Price per Share	Automatic Reinvest	Distribu	
					-			
							_	
							-	

Property Record

Real Estate, Burial Plot, Motor Vehicles, etc.

					Payments				
Location/Type	Owner(s)	Purchased Date Price		Monthly Principal and Interest		Escrow Account	Monthly Payment Date	Final Payment Date	
Desc	ription of Major Improvements			Date		Location		Cost	

Debts Outstanding

Company or Person Owed	Address	Amount	Payment	Payment Due Date	Final Payment Date

Money Owed the Family

Person Owing Family	Address	Amount	Date Due	How and When Payable

Notes

Adapted from a publication of the same title written by Irene Hathaway, Extension specialist emeritus, Family Resource Management, Michigan State University.



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