
RECORD OF IMPORTANT FAMILY PAPERS

Personal and Financial Records

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Family Resource Management

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Contents

This booklet can help you find important papers quickly.

It can help others find your papers in an emergency.

It can provide helpful information in case records are lost or destroyed.

Fill out each form as completely and accurately as necessary for your needs. Each family is different. Some want more detail than others.

Keep this booklet in an easy-to-find place in your permanent home file.

Keep your records up to date by checking at least once a year.

Date completed _____

Date(s) revised _____

Family Information (Page 1)

Family Records
Power of Attorney
Close Relatives or Friends
Family Advisors

Location of Your Valuable Papers (Pages 2 & 3)

Wills and Instructions
Personal Papers
Business Papers
Personal Property Papers
Real Estate Papers

Insurance (Pages 4 & 5)

Health, Accident, Disability and Hospital Insurance
Life Insurance
Homeowners, Auto and Other Property Insurance

Retirement Plans (Page 5)

Checking and Savings (Page 6)

Credit and Charge Cards (Page 7)

Real Estate Record (Page 8)

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)

	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				

Credit and Charge Cards

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



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