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 Information

FAMILY RECORDS

FAMILY ADVISORS

Name	Date of Birth	County Where Birth is Recorded	Name	Address - Phone Number
	Ditti	Diffit is necolaca		Audiess - Filore Hamber
Husband			Clergy	
Wife			Doctor(s)	
Children				
11				
			Accountant	
9			Banker(s)	
			Broker(s)	
	OF ATTORNEY			
If you have given someone the written leg you unable to handle your own affairs, in	gal power to act for you	u in case conditions make		
Name	Address - Phone		Insurance Agent(s)	
			-	
		,	Lawyer	
CLOSE RELATI			Financial Advisor	
List those persons who should be notified			E	
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 (ν) actual location or write in location.

Home File	Safe Deposit Box	Billfold	Other		Home File	Safe Deposit Box	Billfold	Other
				BUSINESS PAPERS				
				Contract Papers				
				Patents, Copyrights				
				PERSONAL PROPERTY PAPERS				
				Insurance Policies				
				Health				
				Life				
				Property				-
			920	Stock or Bond Certificates				
				Savings Bonds				
				Automobile Title and Bill of Sale				
				Automobile Registrations				
				Safe Deposit Box Key				
				Income Tax Records				
				Cancelled Checks and Stubs				
		Home Deposit	Home Deposit	Home Deposit	Home File Deposit Bullfold Other BUSINESS PAPERS Contract Papers Patents, Copyrights PERSONAL PROPERTY PAPERS Insurance Policies Health Life Property Stock or Bond Certificates Savings Bonds Automobile Title and Bill of Sale Automobile Registrations Safe Deposit Box Key Income Tax Records	Home File Business papers Contract Papers Patents, Copyrights Personal Property Papers Insurance Policies Health Life Property Stock or Bond Certificates Savings Bonds Automobile Title and Bill of Sale Automobile Registrations Safe Deposit Box Key Income Tax Records	Home Deposit File	Home File Deposit File Deposit Bullfold Other Business Papers Contract Papers Patents, Copyrights PERSONAL PROPERTY PAPERS Insurance Policies Health Life Property Stock or Bond Certificates Savings Bonds Automobile Title and Bill of Sale Automobile Registrations Safe Deposit Box Key Income Tax Records

	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				
				je je					
				_					

Insurance

HEALTH, ACCIDENT, DISABILITY, AND HOSPITAL INSURANCE

Policy Number	Company, Address	Type of Insurance	Agent Name, Address
		100	
	Policy Number	Policy Number Company, Address	Policy Number Company, Address Type of Insurance

LIFE INSURANCE

Name of Insured	Policy Number	Company, Address	Face Value	Type of Policy	Beneficiary(s)	Amount of Loan Against Policy	Agent Name, Address
		11					

HOMEOWNERS, AUTO, AND OTHER PROPERTY INSURANCE

Property Insured, Type of Coverage	Policy Number	Company, Address	Amount	Agent Name, Address
,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		- to the three -		

Retirement Plans

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

For Whom	Type of Plan	Name of Institution	Amount Invested	Date	Identification Number
For Whom	type of Flan	Harrie of institution	Timodic invested	Dute	

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

Credit and Charge Cards

Card Name	Name(s) on Card	Card Number	Issuer	If Lost or Stolen, NOTIFY:
	12.77			Phone:
				Address:
				Phone:
				2 323232
				Address:
				Phone:
				Address:
				Phone:
				Address:
				Address:
				Phone:
				Address:
				Phone:
				Address:
				Phone:
				3.746.M2
				Address:

Real Estate Record

			Payments					
Owner(s)	Location	Purchased Date Price		Present Market Value	Principal and Interest	Escrow Account	Monthly Payment Date	Final Payment Date
		Dute	71100					
							2	
cription of Major Impro	vements	100			Date	Loc	ation	Cost
					1			

Government Bonds

Savings bonds, Treasury bonds

Owner(s)	Serial Number	Purc Price	hase Date	Mat Date	urity Value	Beneficiary
Owner(s)	Hamber	Frice	Date	Date	value	Beneficiary
		- 1				
				-0		
			-			

Municipal and Corporate Bonds

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

Mutual Funds

List each mutual fund owned by the family.

	Company			Shares Purchased	Price
Owner(s)	Company	Identification Number	Date	Number	Price
				_	



0 (1)			Shares Purchased			
Owner(s)	Company	Certificate Number	Date	Number	Price Per Share	
	-					
				-		
					-	

Debts Outstanding

		- acocarrar	-3		
Company or Person Owed	Address	Amount	Payment	Payment Due Date	Final Payment Du
				1	
	Money O	wed the Fa	amily	N.	
Person Owing Family	Money O	wed the Fa	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
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