
RECORD OF IMPORTANT FAMILY PAPERS

Personal and Financial Records

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Family Resource Management

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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)

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Real Estate Record (Page 8)

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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
Husband			Clergy	
Wife			Doctor(s)	
Children				
			Accountant	
			Banker(s)	
			Broker(s)	
POWER OF ATTORNEY				
If you have given someone the written legal power to act for you in case conditions make you unable to handle your own affairs, indicate below.				
Name			Address - Phone Number	
			Insurance Agent(s)	
			Lawyer	
CLOSE RELATIVES OR FRIENDS				
List those persons who should be notified when serious emergencies occur.				
Name			Address - Phone Number	
			Financial Advisor	
			Executor or Trustee of Will	
			Employee Fringe Benefits Office	

	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				

HOMEOWNERS, AUTO, AND OTHER PROPERTY INSURANCE

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

Retirement Plans

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

For Whom	Type of Plan	Name of Institution	Amount Invested	Date	Identification Number

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: _____ _____

Government Bonds

Savings bonds, Treasury bonds

Owner(s)	Serial Number	Purchase		Maturity		Beneficiary
		Price	Date	Date	Value	

Municipal and Corporate Bonds

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

Stocks

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



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