A RECORD OF IMPORTANT FAMILY PAPERS

Name		Date Recorded or Revised										
Copy 1 of this record		Copy 2 is kept at										
Safe Deposit Box Nu		Key to Safe Deposit Box Kept at										
Social Security Numb	oers	_		Social Secur	rity Cards Ke	ept at						
			NAMES OF	ADVISORS								
Advisor	Name			Ad	ddress				Phon	ne Number		
Accountant												
Attorney												
Banker												
Broker												
Doctor												
Executor												
Insurance Agent												
Other												
			Insuranc	E POLICIES								
	Company & Add	ress	Policy	Effective	Policy		Payment	Bene	ficiary	Location		
Type			Number	Date	Amount	Premium	Due	(if	any)	of Policy		
Health & Accident												
Hospitalization												
Major Medical												
Medicare Supplemental												
Disability												
Life												
Life												
Auto												
Auto												
Homeowners/Renters												
Umbrella Liability												
Long Term Care			I			I						

	_			В	ANK A	ND CREDIT U	NION A	Acco	OUNTS_				_				
Type		Name & Address of Financial Institution			Name(s) on Account			ount	Account Number				Location of Bank Book				
Checking																	
Checking																	
Savings																	
				ST	OCKS,	BONDS, AND	Mutu	J al F	FUNDS	_					_		
Type of											Number Cost						cation of
Asset		Cor	mpany	Phone Number	Name on Certificate		eate	Pur	Purchased of S		Shares Share		e	e Income Due		Certificate	
						DEBT	S				Ī						-
									Amou	int of	Inter			er and ant of	Fina Payme		Location of
Desci	riptio	n	Name and	d Address of Cred	ditor Account Nu		Numb	oer			Rat		Payments		Due		Records
						PAYMENTS	S DUE										
				ress of Person Ow	ing	Payment						mount o	of		ayment		ocation of
Descr	riptio	n	I	Payment		Amount	Amount Interest		est Rate		Payments			Due		Records	
																+	
																1	

		IRAs, 401	l(k)s, 4	103(b)s, I	PENSIC	N PLANS,	Етс.					
Description		Name & Address of Company Providing Payments		Payment Amount Interes				nber & Amount of Payments		Final Paymen Due	Location of Records	
							<u> </u>					
							<u> </u>					
	U.S. SAVING								ITIES		l	
Serial Number	Owner(s)	Purch Prio		Date of Purcha		Maturity Date	Valu Matu		Ber	neficiary	Location of Securities	
	,											
	i]	REAL ES	TATE	Martas	~~			1	Location of	
Туре	Location		Purc	chase Pric	ce	Mortga Amou			Mortgage	Holder	Records	
				VEHIC	LES	_		_				
Make Model & Year V		Vehicle I	Vehicle Identification Nu (VIN)		umber	r Purchase Pric		ice Registration		on Name	Location of Records (e.g., Auto Title)	
			`	,							,	
		-										

OTHER IMPORTANT PAPERS										
	Location		Location		Location					
Type of Paper	Kept	Type of Paper	Kept	Type of Paper	Kept					
Adoption Papers		Deed to House & Lot		Military Service Records						
Automobile Title(s)		Divorce Papers		Organization Membership						
Baptismal Records		Education Records		Passports						
Birth Certificates		Employment Records		Pension Records/Retirement Plans						
Business Records		Guarantees/Warranties		Patents & Copyrights						
Cancelled Checks		Health Records		Real Estate Abstract(s)						
Credit Card Account List		Household Inventory		Rental Property Records						
Citizenship Papers		Important Keys		Social Security Card & Records						
Death Certificates		Last Instructions		Tax Records						
Deed to Burial Plot		License(s) to Practice		Will for (Name)						
Deed to Farm & Lots		Marriage Certificate		Will for (Name)						

Identify Locations:

SDB Safe Deposit Box

FPB Fire Proof Box at Home HFS Home Filing System

W Wallet

O Other (Indicate Location)