

Family Records¹

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This record should be kept in a safe place known to every adult member of the family or trusted friend. An additional copy should be kept in a safe deposit box. Revise it annually to keep the vital information current.

These records should be kept in a safe deposit box or fireproof strong box at home:^a

- Personal Information
- Passports
- Retirement Pension System
- Wills
- Bonds, Stocks, Mutual Funds
- Life Insurance and Annuities
- List of and number of Medical Care and Disability Insurance
- List of and number of Automobile, Boat, Homeowners, Special Policies (Jewelry, Antiques, etc.) and Personal Liability

- Insurance
- Real Estate and Business Interests
- Personal Property (Automobiles, Boats, Jewelry, Antiques, etc.)
- Household Inventory

These records should be kept in an active file:^b

- Persons to be Notified in an Emergency
- Drivers' Licenses
- Social Security Cards
- Educational Information
- Health Records
- Employment Records
- Advisors
- Location of Safe Deposit Boxes
- Checking Accounts number, Savings Accounts number, Certificates of Deposits

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- Tax Records
- List of Credit Cards
- Household Debts
- Guarantees and Warranties
- Insurance Policies

Table 1.

Persons to be Notified in an Emergency:		
Name	Relationship	Address & Telephone Number

Table 2.

Personal Information:			
Record	Where Kept	Where Recorded	Date
Birth or Adoption Certificates:			
Marriage Certificate(s):			
Divorce Decrees:			
Death Certificates:			
Military Service Records:			

Table 2.

Citizenship Papers:			

Table 3.

Passports: ^a		
Name	Number	Expiration Date

Table 4.

Drivers' Licenses: ^b		
Name	Number/State	Where Kept

Table 5.

Social Security Cards: ^b		
Name	Number	Where Kept

Table 8.

Employment Records: ^b				
Name	Employer's Name and Address	Dates	Supervisor	Wage or Salary

Table 9.

Advisors: ^b		
Service	Name	Address and Telephone Number
Accountant		
Attorney		
Banker		
Doctors & Specialty		
Dentist		
Financial Counselor		
Executor of Will		

Table 9.

Insurance Agents		
Clergyman		
Other		

Table 10.

Safe Deposit Boxes: ^b			
In Whose Name	Name of Institution and Location of Bank	Box Number	Location of Key(s)

Table 11.

Retirement Pension System: ^a			
Name	Name & Address of System	Contract #	Where Kept

Table 12.

Wills: ^a	
Name	Where Kept

Table 13.

Checking Accounts, Savings Accounts, Certificates of Deposit: ^b			
Account Number	In Whose Name	Name and Address of Financial Institution	Location of Certificates, Checkbooks, Savings Passbooks
Checking:			
Savings:			
Certificates of Deposit:			

