A RECORD OF IMPORTANT FAMILY PAPERS

Name	Date Recorded or Revised
Copy 1 of this record is kept at	Copy 2 is kept at
Safe Deposit Box Number is at	Key to Safe Deposit Box Kept at
Social Security Numbers	Social Security Cards Kept at

NAMES OF ADVISORS						
Advisor	Name	Address	Phone Number			
Accountant						
Attorney						
Banker						
Broker						
Doctor						
Executor						
Insurance Agent						
Other						

	INSURANCE POLICIES									
Туре	Company &	Policy	Effective	Policy	Premium	Payment Due	Beneficiary	Location of		
	Address	Number	Date	Amount			(if any)	Policy		
Health & Accident										
Hospitalization										
Major Medical										
Medicare Supplementa	l									
Disability										
Life										
Life										
Auto										
Auto										
Homeowners/Renters										
Umbrella Liability										
Long Term Care										

					BA	ANK AND CR	EDIT U	NION ACC	COUNTS				
Туре	Name & Instituti		of Financial		Name(s) on Accoun	t	Ac	Account Number		Location of Bank Book		Book
Checking					1					I			
Checking													
Savings													
						OCKS, BONI					<u>.</u>		
Type of Asset	Cor	npany	Phone Number	Nan	ne on Ce	rtificate	Date 1	Purchased	Number of Shares	Cost Per Share	Income D	ue	Location of Certificate
							D EBT	S					
Descrij	ption	Nam	e and Addre Creditor	ss of	Accou	nt Number	Am	nount of Debt	Interest Rate	Number and Amount of Payments	Final Paym Due	ent	Location of Records
						Раз	YMENT	S DUF					
Descrij	otion	Name &	& Address	Pav	nent	Interest R			r & Amount of	Final Pay	ment Due	I	ocation of
Desering	ption	of Pers	on Owing yment		ount				ayments	1 11111 1 49		-	Records

		IRAS, 401(k)S, 4	IUS(D)S, PENSION	N PLANS, ETC.		
Description	Name & Address of Company Providing Payments	Payment Amount	Interest Rate	Number & Amount of Payments	Final Payment Due	Location of Records
Serial Number	U.S. SAVINGS Owner(s)	BONDS, CERTIFIC Purchase Price	CATES OF DEP Date of	OSIT, TREASURY SI Maturity Date	ECURITIES Value at Maturity	Beneficiary
Serial Number		· · · · · · · · · · · · · · · · · · ·				Beneficiary
Serial Number		· · · · · · · · · · · · · · · · · · ·	Date of			Beneficiary

			REAL ESTATE		
Туре	Location	Purchase Price	Mortgage Amount	Mortgage Holder	Location of Records
			VEHICLES		
Make	Model & Year	Vehicle Identification Number (VIN)	Purchase Price	Registration Name	Location of Records (e.g., Auto Title

OTHER IMPORTANT DOCUMENTS

Type of Paper	Location Kept	Type of Paper	Location Kept	Type of Paper	Location Kept
Adoption		Deed to House & Lot		Military Service Records	
Papers					
Automobile		Divorce Papers		Organization Membership	
Title(s)					
Baptismal		Education Records		Passports	
Records					
Birth		Employment Records		Pension Records/Retirement	
Certificates				Plans	
Business		Guarantees/Warrantie		Patents & Copyrights	
Records		S			
Cancelled		Health Records		Real Estate Abstract(s0	
Checks					
Credit Card		Household Inventory		Rental Property Records	
Account List					
Citizenship		Important Keys		Social Security Card &	
Papers				Records	
Death		Last Instructions		Tax Records	
Certificates					
Deed to Burial		License(s) to Practice		Will for	
Plot				(Name)	
Deed to Farm &		Marriage Certificate		Will for	
Lots				(Name)	
Deed to Farm &				Will for	

Identify Locations: SDB Safe Deposit Box FPB Fire Proof Box at Home HFS Home Filing System W Wallet O Other (Indicate Location)

Adapted from *A Record of Important Family Papers* by P. Christopher Beaugard, Family & Consumer Sciences Educator, Rutgers Cooperative Extension of Ocean County.

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