

Inventory and Record of Valuable Papers



Every person has important papers relating to personal records, property ownership, insurance, finances, and other business affairs. Good management dictates that one should periodically take inventory of these valuable papers.

This publication will help you:

- Inventory your important papers
- Direct others in an emergency
- Evaluate your family business affairs

Fill in the categories and file this list in a handy place at home. Review it at least once a year. Bring it up to date whenever significant changes occur. You may want to make copies to put in your safe-deposit box and for a relative or close friend for use in case of an emergency.

Your name _____

Address _____

Date prepared _____

FAMILY RECORD

List all members of your family, including children married and/or living away from home. You may want to write under special comments, such information as health conditions, membership in organizations, etc., that would be useful in cases of emergency.

Name	Date of birth and where birth is recorded	Social security number	Special comments
Self			
Spouse			
Children and addresses			

CLOSE RELATIVES OR FRIENDS

List persons who should be notified when serious emergencies occur.

Name	Address and phone number

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 and phone number

DURABLE POWER OF ATTORNEY FOR HEALTH CARE

Name	Address and phone number

FAMILY ADVISERS

Write name and address for as many of the kinds of advisers as you depend on in your personal and business affairs.

Name	Address and phone number
Clergy	
Doctor	
Accountant/CPA	
Banker	
Broker	
Insurance agents	
Lawyer	
Financial Planner	

LOCATION OF YOUR VALUABLE PAPERS

Being able to find your valuable papers quickly is vital to you or your survivors. Under locations, clearly identify the specific desk and drawer, closet, box, etc.

Wills and instructions	Location	Wills and instructions	Location
My will		Living will (advance health-care directive)	
Spouse's will		Memorial society membership	
Copies of wills		Special letters of instruction	
Funeral directions —cremation, burial			
Personal Papers	Location	Personal Papers	Location
Adoption certificates		Family health records	
Baptismal certificates		Marriage certificates	
Birth certificates		Military records	
Death certificates		Naturalization papers	
Diplomas		Passports	
Divorce certificates		Social Security cards	
Employment records			
Personal property papers	Location	Personal property papers	Location
Appliances — instruction books		Insurance (accident, health, life)	
Canceled checks and stubs		Registrations – auto, dog, etc.	
Checkbooks		Safe deposit box and key	
Credit cards (List them)		Savings bonds	
Guarantees on appliances		Savings and certificates	
Income tax records		Stock certificates	
Inventory of household goods		Title to motor vehicles	
Real Estate Papers	Location	Real Estate Papers	Location
Deed to your house		Mortgage papers	
Deed to other real estate		Mortgage payment receipts	
Insurance policies		Record of improvements	

BANKING SERVICES

Banks, savings and loan associations, credit unions, etc., provide many financial services for families.

List services you are using.

Name and address of financial firm	Identification number	In whose names(s)
Checking accounts:		
Savings accounts:		
Certificates of deposit:		
Money market certificates:		
Trust accounts:		
Safe-deposit box:		
Other services (including financial planner):		

REAL ESTATE AND BUSINESS INTERESTS

List here real property and business interests owned by the family. Also include mortgages held. Kind of ownership refers to tenancy in common or joint tenancy.

Kind of property	Location (address)	Name(s) of owner	Kind of ownership	Date acquired	Purchase price

SOCIAL SECURITY, RETIREMENT, AND EMPLOYMENT

Data concerning these items are often needed in filing applications, checking records, settling estates, etc.

Social security		Employment record		
Name of insured	Social security number	Family member	Dates of employment	Name of employer
	- -			
	- -			
	- -			
	- -			
	- -			
Retirement, pension, or profit-sharing plan				
Person in system	Name of system			

MONEY OWED

This list can help you realize how much of your future income or other assets you have promised to others. It would be extremely valuable to those who handle your affairs during serious illness or your death.

Person or company owed	Address	Size of original debt	Terms of payment

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