# Inventory and Record of Valuable Papers



E very 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 safedeposit 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 FRI List persons who should be r		ncies occur.	
Name		Address and phone number	
POWER OF ATTORNEY If you have given someone the fairs, indicate below.	ne written legal power to act	for you in case conditions make	you unable to handle your own af-
Name		Address and phone number	
DURABLE POWER OF ATT	ORNEY FOR HEALTH CAR	E	
Name		Address and phone number	
FAMILY ADVISERS Write name and address for a	ns many of the kinds of advis	ers as you depend on in your pe	rsonal 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	3	Title to motor vehicles	
Real Estate Papers	Location	Real Estate Papers	Location
1		Mortgage papers	
Deed to your house		0.0 L L	
Deed to your house  Deed to other real estate		Mortgage payment receipts	

# 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	has the familie Alas to Jude as	and hald Wind of an armitic and

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

# STOCKS, BONDS, AND SECURITIES

List the United States Savings Bonds, Treasury securities, government agency securities, corporate and governmental stock certificates, and other securities owned by the family.

Name of asset	Serial number	Date purchased	Purchase price	Other useful information (name of owner, no. of shares, maturity date

# MUTUAL FUNDS

List each mutual fund and money-market fund owned by the family.

Company name and fund type	Identification number	Date acquired	Original amount	Other useful information (name of owner, no. of shares, maturity date)

## OTHER PERSONAL PROPERTY

List autos, boats, mobile home, and other items of value (jewelry, antiques, books, collections, royalties, patents, etc.).

Name of asset	Date acquired	Purchase price or value	Other useful information (name of owner, where acquired, storage place)

### PROPERTY INSURANCE

Owners of property carry insurance on different kinds of risks, e.g., fire, wind, liability, theft, etc. In this section, inventory your insurance policies.

Description of property insured	Kind of risk insured	Amount of coverage	Policy number	Name of company
property insured	iisk iiisuieu	of coverage	number	
Real estate:				
Automobiles:				
Other personal property:				
Personal liability:				
Other:				

### LIFE INSURANCE AND ANNUITIES

Inventory all life insurance policies and annuities carried on members of the family. Indicate kind of policy, such as term, whole life, endowment, family income, etc. If owner of policy is not the person insured, give both names.

Person insured	Kind of policy	Face value	Policy number	Beneficiary	Name of company
HEALTH INSURANCE — Include major medical, of	<ul> <li>ACCIDENT, DE her employer's ins</li> </ul>	ENTAL, DISAE urance, Medic	SILITY, HOSPITA are, and/or indiv	L idual policies on fan	nily members.
HEALTH INSURANCE — Include major medical, ot Person(s) insured	– ACCIDENT, De her employer's ins Kind of policy	ental, Disae urance, Medic Amour coveraș	are, and/or indiv	L idual policies on fan Policy number	nily members.  Name of group or company providing insurance
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#### 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, pens	sion, 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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