

Your Valuable Records



A form to help you keep track of all of your family's valuable records.

Your family is a small business unit, and it deserves to be operated just as efficiently as any other business. You have many papers necessary for managing your personal and business affairs. Some are more important than others, but all need to be accessible when needed, and stored in a safe place.

Receipts, documentation, proofs of ownership, and pieces of identification may be needed to collect insurance, pension, or retirement benefits; to receive military compensation; and to solve tax or inheritance problems. Do you know where all your records are located? Would someone else know in the case of your injury or death?

You may wish to keep two copies of this listing of valuable records—one in a safe deposit box or fireproof and burglarproof home safe, and another in a convenient location at home. Because of the nature of the information, even the copy kept at home should be stored in as safe a location as possible.

NAME:	DATE:
Copy 1 Stored Where:	Copy 2 Stored Where:
Safe Deposit Box No./Location:	Key:

Personal Information

Family Member Name	Date of Birth	Where Birth Certificate Kept	Social Security Number	Where Social Security Card Kept

Important Advisers

Type	Name	Address	Telephone
Attorney:			
Exectuor: Husband's Will			
Executor: Wife's Will			
Religious Adviser:			
Doctor(s):			
Accountant/Tax Adviser:			

Bank or Trust Officer:			
Business Manager:			
Health Insurance Agent:			
Auto Insurance Agent:			
Home Insurance Agent:			
Other:			

Property

Type	Owner	Type of Ownership	Date Acquired	Location/ Description	Where title is kept	Additional Information
Real Estate						
Residences						

Business						
Vacation						
Motor Vehicles						
Other						

Banking, Savings, and Investments

For additional tools for caregiving or aging, visit www.CaregiversLibrary.org

Investment Trusts, etc.						
IRAs, KEOGH Accts., SEPs						
Retirement Plans, Pensions, etc.						
Other						

Insurance (Life, Health, Homeowner's/Renter's, Auto, etc.)

Type	Company	Policy No.	Where Kept	Beneficiary Info.		Policy Owner	Person/Property Insured	Value
				Primary	Contingent			

Credit Cards

Type of Card	In Name of:	Acct. Number	<i>in lost or stolen, notify:</i>		
			Company	Address	Telephone

Debt Information

Type	Company/Person and Address	Amount	Payment Plan	Where records kept

Membership in Organizations/Clubs

Organization	Address	Telephone	Membership Information	
			In whose name	Number

Other Important Records

Group	Record Type	Where Kept?	Additional Information
A	Adoption Papers		
	Baptismal Records		
	Bill(s) of Sale		
	Citizenship Papers		
	Diplomas		
	Divorce Papers		
	Easements/Rights-of-way		
	Household Inventory		
	Irreplacable Receipts/Proofs of Tax Deductions		
	Marriage Certificate		
	Military Records		
	Passport Papers		
	Power of Attorney		
Will(s)			
B	Education Records		
	Employment Records		
	Family History		
	Funeral/Burial Records		
	Household Inventory(copy)		

	Income/Expense Records		
	Income Tax Returns/Replacable Proofs of Deduction		
	Medical Records		
	Net Worth Statements		
	Safe Deposit Box Inventory		
	Appliance Manuals/Warranties		
	Will(s) (copy)		
C	Employee ID Card(s)		
	ID Card/Whom to notify in emergency		
	Insurance/Medical Cards		
Other			

* **Guideline:** The more important the record, and the more expensive and difficult it is to replace, the safer the storage location should be. For some records (will, family history, tax returns, household inventory) you may wish to keep copies in more than one location. **Group A** items should be kept in a safe deposit box or fireproof and burglarproof home safe. **Group B** items can generally be stored in a home business center, file cabinet, desk, etc. **Group C** items should be carried in your purse or pocket.

©Copyright FamilyCare America, Inc. All Rights Reserved.

Reprinted from “Managing Time, Work & Family,” by Emily Mark and Katey Walker, Kansas State University.



For additional tools for caregiving or aging, visit www.CaregiversLibrary.org