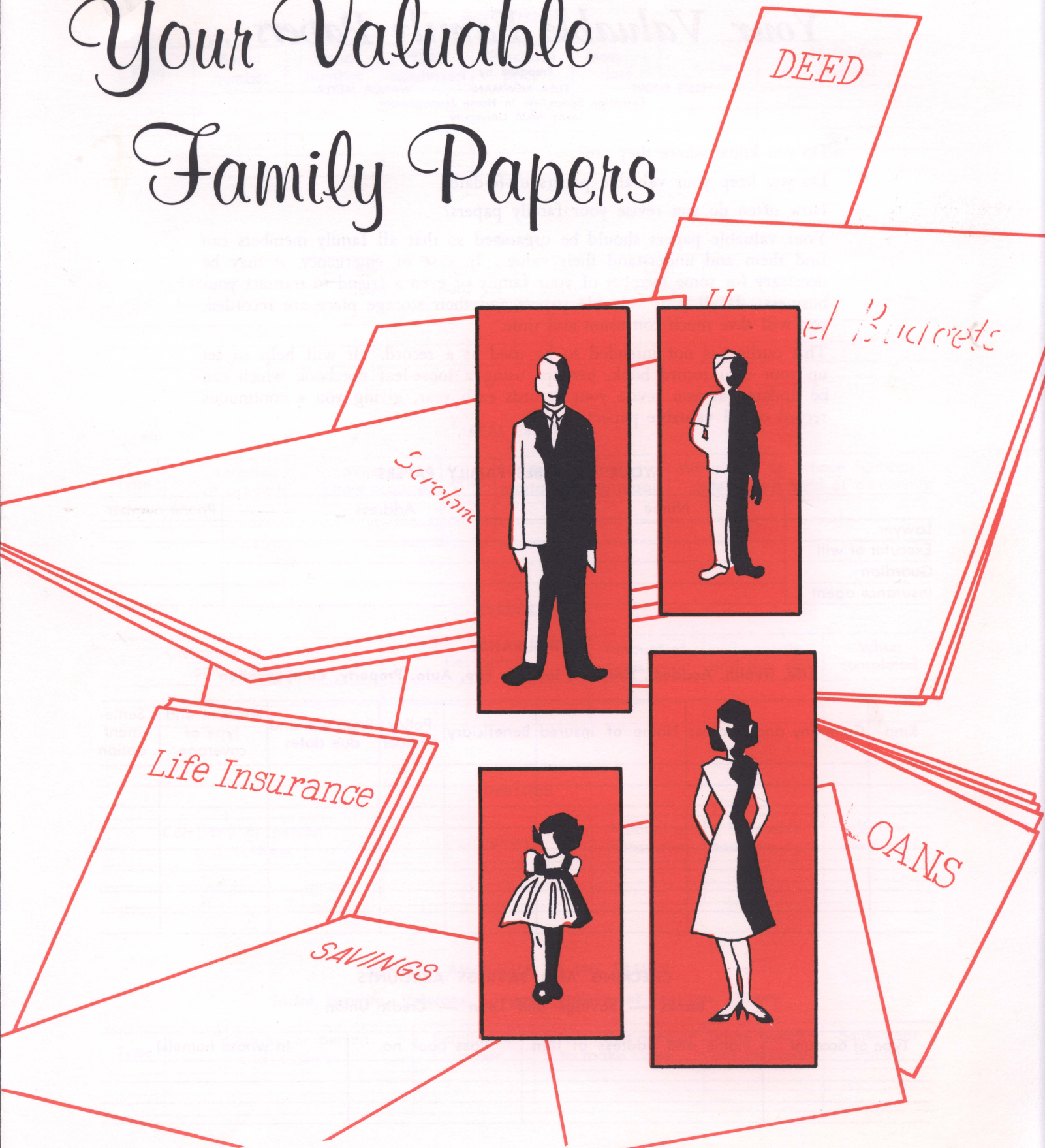


Your Valuable Family Papers



Your Valuable Family Papers...

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Do you know where they are?

Do you keep your valuable papers up-to-date?

How often do you revise your family papers?

Your valuable papers should be organized so that all family members can find them and understand their value. In case of emergency, it may be necessary for some member of your family or even a friend to transact your business. If all your valuable papers and their storage place are recorded, you will save much confusion and time.

This outline is not intended to be used as a record. It will help to set up your own record book, perhaps using a loose-leaf notebook which can be updated as you revise your records each year, giving you a continuous record of all valuable papers.

YOUR VALUABLE FAMILY PAPERS

	Name	Address	Phone number
Lawyer			
Executor of will			
Guardian			
Insurance agent			

INSURANCE

Life, Health, Accident, Hospital, Income, Fire, Auto, Property, Compensation

Kind	Company and address	Name of insured	Beneficiary	Policy number	Premium and due dates	Amount and type of coverage	Settlement option

CHECKING AND SAVINGS ACCOUNTS

Banks — Savings and Loan — Credit Union

Type of account	Name and address of firm	Pass book no.	In whose name(s)

INVESTMENTS

Kind	Serial number	Bond number	Date purchased	Purchase price	Maturity date	Value	In whose name(s)

Stocks

Company	Serial number	Date of purchase	No. shares	Cost per share	In whose name(s)

REAL ESTATE

Type	Location of property	When and how acquired	Price	Holder of mortgage	Amount of mortgage	Maturity date	In whose name(s) and kind of ownership

CREDITORS

Company or person and address	Description	Amount of transaction	Payments and due date	When completed

DEBTORS

Company or person and address	Description	Amount of transaction	Payments and due date	When completed

BENEFITS AVAILABLE TO THE FAMILY

Social Security, Veterans, Lodges, Employment Pensions, Others

Type	Company or person and address	Enrollment number	Information needed to make claim	When benefits are available	Settlement option

IMPORTANT INFORMATION AND LOCATION OF RECORDS

PERSONAL

BUSINESS

Record	Where kept	Record	Where kept	Record	Where kept
Wills		Social Security		Contract papers	
		Name	Number	Guarantees	
				Insurance policies	
				Insurance premium receipts	
		Education records		Income tax records	
		Employment records		Important receipts	
		Family health records (Vaccination, etc.)		Household inventory	
		Burial plot		Bank books	
Marriage records		Burial instructions		Cancelled checks	
Registration papers				Safety deposit box	
Citizenship papers				Safety deposit keys	
Armed forces papers				Other important keys	
Adoption papers				Stock and bond certificates	
				Automobile title	

FAMILY MEMBERS

AUTOMOBILE

Names and address	Birth date	Relationship	In whose name(s) registered	License no.	Motor no.



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