

YOUR FAMILY RECORD-KEEPER

Names _____
 Social Security Nos. _____
 Driver's Licenses _____
 Registrations _____
 License Plates _____

FINANCIAL INFORMATION

Bank/Money Market	Acct No.	Type (checking, saving, etc.)	Owner (H, W, J or T)*

Item	Company or Type	Owner (H, W, J or T)*	Certificate/Acct. No. or Due Date	Location (safe, home file, etc.)
Stocks/ Bonds				
Government Securities				
Notes Due You				
Loan Agreements				
Bank Passbooks				
Pension and Profit Sharing				
IRA/ Keogh				

*Husband, Wife, Joint or Trust

FINANCIAL INFORMATION (continued)

Item	Owner	Location
Tax Returns		
Canceled Checks		

SAFE-DEPOSIT BOX

No. of Box _____
 Location of Box _____
 Location of Keys _____
 Authorized People _____

VALUABLES (jewelry, silverware, electronics equipment, etc.)

Item	Cost New	Serial No.

LAWYER: Name _____

Address _____ Phone _____

DOCTORS: Name _____

Address _____ Phone _____

Name _____

Address _____ Phone _____

RELIGIOUS AFFILIATION: _____

ACCOUNTANT: _____

BRADY & COMPANY
 CERTIFIED PUBLIC ACCOUNTANTS
 8326 - 196th Street Southwest
 Edmonds, Washington 98026

 (425) 774-7142

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PERSONAL PAPERS

Item	Location
Birth Certificates	_____

Marriage Certificate	_____
Divorce Papers	_____
Passports	_____
Wills	_____
Military Discharge	_____
Powers of Attorney	_____
Who Holds Powers of Attorney	_____ Phone _____
	_____ Phone _____
Other	_____

INSURANCE

Type	Company	Policy No.	Location	Agent
Homeowners	_____	_____	_____	_____
	_____	_____	_____	_____
Personal Property	_____	_____	_____	_____
	_____	_____	_____	_____
Automobile	_____	_____	_____	_____
	_____	_____	_____	_____
Medical	_____	_____	_____	_____
	_____	_____	_____	_____
Major Medical	_____	_____	_____	_____
	_____	_____	_____	_____
Life	_____	_____	_____	_____
	_____	_____	_____	_____
Other	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____

REAL ESTATE PAPERS

Item	Location
Mortgages or Deeds of Trust	_____
Title Policies	_____
Deeds	_____
Surveys	_____
Tax Assessments	_____
Rental Agreement (lease)	_____
Other	_____

CREDIT CARDS

Name	Number	To Report a Missing Card
American Express	_____	_____
Visa	_____	_____
MasterCard	_____	_____
Retail Store Cards	_____	_____
	_____	_____
	_____	_____
Other	_____	_____
	_____	_____
	_____	_____