



LAW OFFICE OF
BRYAN FAGAN
— PLLC —

YOUR VALUABLE RECORDS

A form to help you keep track 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 forms 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 of a location as possible.

Name: **Date:**

Copy One Stored Location:

Copy Two Stored Location:

Safe Deposit Box Number/Location:

Key Location:

Personal Information

FAMILY MEMBER NAME	DATE OF BIRTH	BIRTH CERTIFICATE LOCATION	SOCIAL SECURITY CARD LOCATION

Important Advisors

TYPE	NAME	ADDRESS	TELEPHONE
Attorney			
Executor: Husband's Trust			
Executor: Wife's Trust			
Religious Advisor			
Doctor(s)			
Accountant/Tax Advisor			
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	TITLE LOCATION	ADDITIONAL INFORMATION
REAL ESTATE						
Residences						
Business						
Vacation						
MOTOR VEHICLES						
OTHER						

Banking, Savings, and Investments

TYPE	INSTITUTION	OWNER	BENEFICIARY	RECORDS LOCATION	ID #	VALUE

Banking, Savings, and Investments (Cont.)

TYPE	INSTITUTION	OWNER	BENEFICIARY	RECORDS LOCATION	ID #	VALUE
Stocks, Mutual Funds, Investment Trusts, Etc.						
IRAs, KEOGH, Accts., SEPs						
Retirement Plans, Pensions, etc.						
Other						

Insurance (Life, Health, Homeowners/Renters, Auto, etc.)

[illegible]

Credit Cards

[illegible]

Debt Information

TYPE	COMPANY/PERSON AND ADDRESS	AMOUNT	PAYMENT PLAN	RECORDS LOCATION

Membership in Organizations/Clubs

[illegible]

Other Important Records

GROUP	RECORD TYPE	LOCATION	ADDITIONAL INFORMATION
A	Adoption Papers		
	Baptismal Records		
	Bill(s) of Sale		
	Citizenship Papers		
	Diplomas		
	Divorce Papers		
	Easements/Right-of-way		
	Household Inventory		
	Irreplaceable Receipts/Proofs of Tax Deductions		
	Marriage Certificate		
	Military Records		
	Passport Papers		
	Power of Attorney		
	Will(s)		
	Trusts		
B	Education Records		
	Employment Records		
	Family History		
	Funeral/Burial Records		
	Household Inventory (copy)		
	Income/Expense Records		
	Income Tax Returns/Replaceable Proofs of Deduction		
	Medical Records		
	Net Worth Statements		
	Safe Deposit Box Inventory		
	Appliance Manuals/Warranties		
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, and household inventory) you may wish to keep copies in more than once location.

- » Group A items should be kept in a safe deposit box or fireproof and burglarproof house safe
- » Group B items can be generally be stored in a home business center, file cabinet, desk, etc.
- » Group C items should be carried in your purse or pocket

Notes