

OTHER RECORDS

Location of Title to Vehicle

Location of Title to Vehicle

Location of Income Tax Records

Creditors

Creditors

Creditors

Debtors

Debtors

Credit Card # Customer Service #

Credit Card # Customer Service #

Credit Card # Customer Service #

Credit Card # Customer Service #

Credit Card # Customer Service #

Credit Card # Customer Service #

Contents of Safe Deposit *(other than noted above)*

What to keep in your safe deposit box and how long to keep it.

What to keep permanently

- Birth Certificate
- Will
- Marriage Record
- Social Security Card
- Paid Mortgage or Loan contracts
- Real Estate Deeds
- Records of jointly owned property
- Other real estate papers

For 10 years

- Income Tax records

For 7 years

- Savings Pass Book (after closed)
- Cancelled Checks
- Check stubs
- Bank statements
- Receipted bills and sales slips
- Property investment records

While in force

- U.S. Savings Bonds
- Warranties and instruction books

During ownership

- Stocks and bonds records (plus 7 yrs.)

Other

- Insurance policies (Consult agency)

PERSONAL RECORD of Important Documents

Provided by

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PERSONAL DATA

Location of Birth Certificate *(or Naturalization Papers)*

Place of Birth Date

Location of Marriage Certificate

Place of Marriage Date

Location of Divorce Papers

State of Jurisdiction Date

Location of Military Records

Social Security Number Location of S.S. Card

Location of Last Will and Testament Date

Executor(s)

Attorney(s)

BANK/CREDIT UNION ACCOUNTS

Note: Be specific when listing location. List institution and branch.

Location of Checking Account Account #

Location of Checking Account Account #

Location of Savings Account Account #

Location of Savings Account Account #

Location of Bank Book(s)

Location of Cancelled Checks

Personal Banker(s)

SECURITIES

Location of Stocks and Bonds

Location of Purchase and Sale Records

Investment Advisor(s)

GOVERNMENT BONDS/ CERTIFICATES

Location of Bonds and Certificates

List of Bonds and Certificates

Serial# Amount Co-Owner Beneficiary Trustee

Serial# Amount Co-Owner Beneficiary Trustee

Serial# Amount Co-Owner Beneficiary Trustee

Serial# Amount Co-Owner Beneficiary Trustee

REAL ESTATE

Location of Deed

Name(s) on Deed

Mortgage Company

Location of Mortgage

Location of Survey

Location of Tax Receipts

Location of Other Real Estate Holdings & Records

LIFE INSURANCE

Location of Policies

Company

Policy # Face Value

Company

Policy # Face Value

Company

Policy # Face Value

Loans Against Policies

MISCELLANEOUS INSURANCE

Location of Policies

Medical/Disability Insurer Policy #

Real Estate Insurer Policy #

Automobile Insurer Policy #

Personal Possessions Insurer Policy #

TRUST FUNDS

Beneficiary

Date Established

Agreement Location

Trustee(s)