

PERSONAL RECORD FILE

You can be very helpful to your spouse and other survivors by simply assembling in one place copies of certain records and documents which they will need.

A manila envelope, marked to show its contents and kept in a place known to your survivors, is sufficient. Only photocopies of important documents should be placed in this envelope. Originals should be safeguarded in a more fire-proof place such as a safe-deposit box. Place a check mark (✓) in front of each item that you have enclosed:

- ____ (a) Will, with name and address of attorney.
- ____ (b) Life, property, and auto insurance policies, with name and address of insurance agent.
- ____ (c) Real estate deed, title policies, closing statements, mortgages, record of mortgage payments, tax receipts, receipts for improvements over the years, etc.
- ____ (d) Leases.
- ____ (e) Name and address of broker or the stock certificates and bonds you own (plus the purchase slips or other records of cost and date of purchase).
- ____ (f) Names of banks and savings and loans and account numbers, and the names of bank or savings and loans officers with whom you deal.
- ____ (g) List of other assets and locations (including loans, second or third deeds of trust, and accounts receivable).
- ____ (h) Safe-deposit box key, name of bank, and box number.
- ____ (i) Income tax returns for the last three years, plus name and address of persons preparing these returns.

- _____(j) Birth certificates for yourself, your spouse, and your dependents.
- _____(k) Marriage certificate or proof of divorce, if appropriate.
- _____(l) Automobile ownership certificate and registration receipt.
- _____(m) Social security card or record of number.
- _____(n) Veteran's discharge paper or certificate.
- _____(o) Contract to which you are a party (including installment purchase agreement).
- _____(p) Business records.
- _____(q) Charge account numbers and plates.
- _____(r) Receipts, appraisals, or valuations for items of substantial value such as jewelry, furs, furniture, silver, art objects, antiques, etc.
- _____(s) List of close relatives, addresses and telephone numbers.
- _____(t) Funeral or memorial instructions, including names of your funeral director or memorial society.
- _____(u) General instructions to surviving spouse or children, including a list of advisors.

This personal record file will also be very helpful if you see an attorney or other advisors.