



**BANK AND CREDIT UNION ACCOUNTS**

Type	Name & Address of Financial Institution	Name(s) on Account	Account Number	Location of Bank Book
Checking				
Checking				
Savings				

**STOCKS, BONDS, AND MUTUAL FUNDS**

Type of Asset	Company	Phone Number	Name on Certificate	Date Purchased	Number of Shares	Cost Per Share	Income Due	Location of Certificate

**DEBTS**

Description	Name and Address of Creditor	Account Number	Amount of Debt	Interest Rate	Number and Amount of Payments	Final Payment Due	Location of Records

**PAYMENTS DUE**

Description	Name & Address of Person Owning Payment	Payment Amount	Interest Rate	Number & Amount of Payments	Final Payment Due	Location of Records

**IRAS, 401(k)s, 403(b)s, PENSION PLANS, ETC.**

Description	Name & Address of Company Providing Payments	Payment Amount	Interest Rate	Number & Amount of Payments	Final Payment Due	Location of Records

**U.S. SAVINGS BONDS, CERTIFICATES OF DEPOSIT, TREASURY SECURITIES**

Serial Number	Owner(s)	Purchase Price	Date of Purchase	Maturity Date	Value at Maturity	Beneficiary	Location of Securities

**REAL ESTATE**

Type	Location	Purchase Price	Mortgage Amount	Mortgage Holder	Location of Records

**VEHICLES**

Make	Model & Year	Vehicle Identification Number (VIN)	Purchase Price	Registration Name	Location of Records (e.g., Auto Title)

OTHER IMPORTANT PAPERS					
Type of Paper	Location Kept	Type of Paper	Location Kept	Type of Paper	Location Kept
Adoption Papers		Deed to House & Lot		Military Service Records	
Automobile Title(s)		Divorce Papers		Organization Membership	
Baptismal Records		Education Records		Passports	
Birth Certificates		Employment Records		Pension Records/Retirement Plans	
Business Records		Guarantees/Warranties		Patents & Copyrights	
Cancelled Checks		Health Records		Real Estate Abstract(s)	
Credit Card Account List		Household Inventory		Rental Property Records	
Citizenship Papers		Important Keys		Social Security Card & Records	
Death Certificates		Last Instructions		Tax Records	
Deed to Burial Plot		License(s) to Practice		Will for (Name)_____	
Deed to Farm & Lots		Marriage Certificate		Will for (Name)_____	

Identify Locations:

- SDB Safe Deposit Box
- FPB Fire Proof Box at Home
- HFS Home Filing System
- W Wallet
- O Other (Indicate Location)