

# Our 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 financial 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 pieces of identification may be needed to collect insurance or retirement benefits; to receive military compensation; and to solve tax or estate settlement problems. Do you know where all your important 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 copy needs to be kept in a very safe location, such as in a safe deposit box. A fireproof and burglarproof home safe is another option, although it may not be "tornado proof." Another copy should be kept 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 a location as possible.

Name/Family: \_\_\_\_\_ Date: \_\_\_\_\_

Copy 1 Stored: \_\_\_\_\_ Copy 2 Stored: \_\_\_\_\_

Safe Deposit Box #: \_\_\_\_\_ At: \_\_\_\_\_ Key: \_\_\_\_\_

## Personal Information

Family Member Name	Birth Date	Where Birth Certificate Kept*	Social Security Number	Where Social Security Card Kept*

\* While adults and responsible youth can carry Social Security cards in their purses or wallets, it may be advisable to keep them in a safer location until they are needed. Birth certificates should be kept in a safe deposit box or fireproof and burglarproof home safe.

Contents of this publication may be freely reproduced for educational purposes. All other rights reserved. In each case, credit Joyce Jones, *Our Valuable Records*, Kansas State University, September 2001.

**Kansas State University Agricultural Experiment Station and Cooperative Extension Service**

MF-685 (Revised)

September 2001

It is the policy of Kansas State University Agricultural Experiment Station and Cooperative Extension Service that all persons shall have equal opportunity and access to its educational programs, services, activities, and materials without regard to race, color, religion, national origin, sex, age or disability. Kansas State University is an equal opportunity organization. Issued in furtherance of Cooperative Extension Work, Acts of May 8 and June 30, 1914, as amended. Kansas State University, County Extension Councils, Extension Districts, and United States Department of Agriculture Cooperating, Marc A. Johnson, Director.

## Important Advisers

Type	Name	Address	Telephone
Accountant or Tax Adviser			
Agents (Powers of Attorney)			
Attorney			
Bank or Trust Officer			
Employer, Personnel Officer, or Business Manager			
Executors (Wills)			
Insurance Agents			
Physicians			
Religious Adviser			
Stockbroker, Financial Planner, or Investment Adviser			
Trustees (Trusts)			
Veterinarian			
Other			

# Property

Type	Owners	Type of Ownership	Date Acquired	Location and Description	Where Title and Ownership Information Kept*	Additional Information
<b>Real Estate:</b> Residences						
Business						
Vacation						
<b>Motor Vehicles</b>						
<b>Other</b>						

\* Titles, deeds, leases, and other important ownership information (including documentation of tax basis) should be kept in a safe deposit box or fireproof and burglarproof home safe.



## Banking, Savings, and Investments

Type	Financial Institution or Company	Address and Telephone	Owners	Where Records Kept*	Identification Number	Beneficiary	Prices and Values	Dates (Purchase, Maturity, etc.)
Stocks, Mutual Funds, Investment Trusts, etc.								
Individual Retirement Accounts, KEOGH Accounts, Retirement Plans, Pensions, etc.								
Other								

\* Some savings and investment information (proofs of ownership and other financial records that would be difficult and/or costly to replace, or that could be transferred or accessed illegally in the case of loss or theft) should be kept in a safe deposit box or fireproof and burglarproof home safe. Monthly, quarterly, or annual statements and canceled checks, which generally can be replaced, can be kept in a home business center, file drawer, desk, etc.

## Insurance (Life, Health, Homeowner's or Renter's, Auto, etc.)

Type	Company and Address	Policy Number	Where Policy Kept*	Additional Information (If Appropriate)					
				Primary Beneficiary	Contingent Beneficiary	Policy Owner	Person/Property Insured	Values	Other

\* Since policies are replaceable, they can be kept in a home business center, file cabinet, desk, etc.

## Credit Cards\*

Type	In Name of	Account Number	If Lost or Stolen, Notify:		
			Company or Institution	Address	Telephone

\* Credit cards are usually carried in your purse or wallet.

### Other Debt Information

Type	Company or Person and Address	Amount	Payment Plan	Where Contracts or Records Kept*	Additional Information

\* Important contracts, notes, liens, and evidence of paid debts should be kept in a safe deposit box or fireproof and burglarproof home safe.

### Membership in Organizations and Clubs\*

Name of Organization	Address	Telephone	Membership Information	
			In Whose Name	Number

\* Membership cards can be carried in your purse or wallet.

## Other Important Records

Group	Record Type	Where Kept*	Additional Information
<b>A</b>	Adoption and Custody Papers		
	Baptismal Records		
	Bills of Sale		
	Citizenship and Naturalization Papers		
	Death Certificates		
	Diplomas		
	Divorce and Separation Papers		
	Easements and Rights-of-Way		
	Household Inventory		
	Irreplaceable Proofs of Tax Income and Deductions		
	Marriage Certificate		
	Military Records		
	Passport (copy of main page)		
	Patents and Copyrights		
	Powers of Attorney (copy)		
	Professional Licenses		
	Property Agreements		
Wills or Trusts			
<b>B</b>	Education Records		
	Employment Records		
	Family History		
	Funeral and Burial Records		
	Household Inventory (copy)		
	Income and Expense Records		
	Income Tax Returns; Replaceable Proofs of Income and Tax Deductions		
	Medical Records		
	Net Worth Statements		
	Passport		
	Powers of Attorney		
	Safe Deposit Box Inventory		
	Warranties and Care Manuals		
	Wills or Trusts (copy)		
<b>C</b>	Identification Cards		
	Insurance and Medical Information Cards		
	Whom to Notify in Emergency		

\* *Guideline: The more important the record — and the more expensive, time consuming, or difficult it is to replace — the safer the storage location should be. For some records (will, trust, family history, tax returns, household inventory) you may wish to keep copies in more than one location. **Group A** items should be kept in a safe deposit box or fireproof and burglarproof home safe. **Group B** items can generally be kept in a home business center, file drawer, desk, etc. **Group C** items should be carried in your purse or wallet.*