



Organize, Communicate, Prepare

Record of Important Papers – Interactive Form

CAUTION! Using this interactive form may place sensitive personal information on your computer. If the computer file is stolen, information contained in the form could result in theft of your identity and could become a threat to your personal assets.

USE AT YOUR OWN RISK!

We recommend you protect your personal information by taking one or more of the following precautions with this file:

1. Only save and store this file on a removable disk (e.g., CD-Rom or floppy disk) rather than saving the file on your computer hard drive. Store the removable disk in a secure place.
2. Password-protect the file using the security features in Microsoft Word. Consult the MS Word help information; search for “password.”
3. Encrypt the folder in which you keep the file using security features of your computer’s operating system. Consult the help features of your operating system; search for “encrypt folder.”

If you password-protect your file or folder, **BEWARE!** Losing the password or encryption key could prevent you from accessing the file. Be careful with your sensitive personal data.

Record of Important Papers – Interactive Form

INSTRUCTIONS: Use this *Record of Important Papers Interactive Form* to make your own family record book. You can enter your information in the shaded areas of this document. If an item already has text in its shaded area, you can change the text simply by typing over it.

To begin using the *Record of Important Papers Interactive Form*, save a copy of the document on your computer. We recommend that you save the document under a different file name (such as “Our record of important papers,” etc.). To change the file name, use the “Save As” command in your word processor.

To enter your information, simply click on the shaded area and begin typing. The columns will expand to accommodate the typed information. You can change or update any of the information that you enter. Use your Tab key to move quickly from one item or column to the next.

After you’ve completed your records, print a copy of the document and keep it in your household files. You may want to keep an additional copy of these forms in your safe-deposit box at the bank or at another safe place away from home.

Revise as needed to keep the information up-to-date.

Your Record of Important Papers

You conduct a variety of business transactions, many of which require supportive records. Birth certificates, proof of ownership, location of property, income tax reports, savings and investment records, insurance policies, guarantees, and warranties are probably among your important papers. These are but a few of the essential records you need to operate your home in a business-like way.

Every man, woman, and mature child should know the location of all important papers that pertain to life and property. Some records should be stored at home; others should be kept in a safer place, such as a bank or lawyer's office. Where you keep your papers will depend partly on how often you use them. You need some records frequently and others only at special times. Family members should know whom to contact for financial advice in case of an emergency. A trusted lawyer, banker, or insurance agent who is familiar with your finances can be helpful in case of a death or other emergency.

This interactive form will help you organize your important papers. Study the pages, analyze each section, and fill in the blanks. After examining your important papers and evaluating your business affairs, you will know whether you need to see a banker, lawyer, or insurance agent to help put and keep your affairs in shape. You may also find the information valuable for estate planning.

When your record is complete, put a printed copy in a safe place. You may wish to keep a duplicate in a bank safe-deposit box or a fireproof, waterproof, and burglar-proof home safe. Bring the information up-to-date at least once a year. Properly filled out and kept current, this information can help you find records when you need them, and it can be a guide to you or others in an emergency.

For more information on what records to keep, why, where, and, for how long, see Extension Publication *Organize Your Important Papers*.

Important Advisers and Contacts

Type	Name	Address	Telephone or email address
Attorney			
Personal representative of my will			
Personal representative of will for spouse/partner			
Religious adviser			
Primary care doctor			
Other doctor:			
Other doctor:			
Other doctor:			
Other doctor:			
Dentist			
Accountant or tax adviser			
Stockbroker/investment adviser			
Banker or trust officer(s)			
Employer or personnel manager			
Business manager or business partner			
Life insurance agent			
Home insurance agent			
Auto insurance agent			
Employer or personnel manager			
Child/adult care provider			
Neighbor or close friend			

Parents—maternal			
Parents—paternal			
Guardian of children			
Children’s school contacts			

Property

Type	Owner(s)	Type of ownership	Date acquired	Location/ description	Location title/ ownership information*	Additional information
Real estate: Residence(s)						
Business(es)						
Timeshare(s)						
Cemetery plot(s)						
Motor vehicle(s)						
Other						

* Store titles, leases, and other important ownership information in a safe-deposit box or fireproof, waterproof, and burglar-proof home safe.

Banking, Savings, and Investments

Type	Financial institution/ company	Address/ telephone	Owner	Location of records	Additional information (if appropriate)			
					I.D. #	Beneficiary	Price/ value(s)	Dates (purchase, maturity, etc.)
Checking account/s								
Savings account/s								
Money market account(s)								
Bonds, treasury bills, etc.								

Banking, Savings, and Investments – continued

Type	Financial institution/ company	Address/ telephone	Owner	Location of records	Additional information (if appropriate)			
					I.D. #	Beneficiary	Price/ value(s)	Dates (purchase, matures)
Stocks, mutual funds, investment trusts, etc.								
Individual Retirement Accounts, Keogh accounts, SEPs								
Retirement plans, pensions, etc.								
Other								

*Savings and investment certificates, bonds, bills, and other evidence of ownership (financial records difficult or costly to replace, or that could be transferred illegally in case of loss or theft) should be kept in a safe-deposit box or fireproof, waterproof, and burglar-proof home safe. Monthly statements and substitute or cancelled checks or their images, which generally can be replaced, can be kept in a home files, desk, etc.

Other Important Records

Guideline: The more important the record, and the more expensive and difficult it is to replace, the safer its storage location should be. If you have more records or storage locations than this form allows, make a copy for each member of your household. For some records (will, 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, waterproof, and burglar-proof home safe. **Group B** items can generally be stored in a home business center, file cabinet, desk, etc. **Group C** items should normally be carried in your purse or wallet or left safely at home.

Group	Kind of paper or record	Location	Additional information
A SAFE DEPOSIT BOX	Adoption papers		
	Baptismal records		
	Birth certificates		
	Citizenship/naturalization papers		
	Death certificates		
	Diplomas		
	Divorce/separation papers		
	Durable powers of attorney		
	Health records (with blood type)		
	Household inventory		
	Irreplaceable receipts (proof of tax deductions)		
	Living will		
	Marriage certificates		
	Military records		
	Passport		
	Patents/copyrights		
	Real estate deeds/easements/rights of way		
	Titles and bills of sale		
	Trust		
	Will		

Other Important Records – continued

Group	Kind of paper or record	Location	Additional information
B HOME FILES	Appraisals: collections/antiques/jewelry/other		
	Bank/credit union statements		
	Cemetery plot/records		
	Computer passwords (copy)		
	Education records		
	Employment records		
	Family history		
	Household inventory (copy)		
	Income/expense records		
	Income tax returns		
	Funeral plan documents/instructions		
	Legal appointments for others (i.e., power of attorney, executor/trix of will)		
	Letter of last instructions		
	Living will (copy)		
	Medical records		
	Net worth statements		
	Safe-deposit box inventory		
Warranties/appliance manuals			
Will (copy)			
C WALLET	Driver's license		
	Employee ID card		
	Identity card/whom to notify		
	Insurance /medical cards		
	Organ donor card		
OTHER	Living will (copy at doctor's office)		

Information About Your Record of Important Papers (this document)

Family Name	
Date this record was updated	
Location of this record – Copy #1	
Location of this record - Copy #2	
Computer file name	
Computer user name	
Computer password	
Safe-deposit box number	
Safe-deposit box location	
Safe-deposit box key location	

Adapted for use in the *Legally Secure Your Financial Future* program
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<http://www.csrees.usda.gov/fsll>

This interactive form is a component of the *Legally Secure Your Financial Future: Organize* learning lesson,
 available on the eXtension web site under Personal Finance:

http://www.extension.org/personal_finance