

Other Records

Location of certificate of title to car

Location of Income Tax records

Creditors

Creditors

Creditors

Debtors

Debtors

Debtors

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

What to keep for 7 years

- ◆ Savings Pass Book (after closed)
- ◆ Cancelled Checks
- ◆ Check Stubs
- ◆ Bank Statements
- ◆ Receipted Bills and Sales Slips
- ◆ Property Investment Records

For 10 years

- ◆ Income Tax Records

While in force

- ◆ U.S. Savings Bonds
- ◆ Warranties and Instruction Books

During ownership

- ◆ Stocks and Bonds Records (plus 7 years)

Other

- ◆ Insurance Policies (consult agency)

Keep Track of Important Things



This folder affords you a handy list of your important records. It's a compact, easy to use reference for you and your family.

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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 S.S. Card located

Location of Last Will and Testament Date of Will

Executor

Attorney

Bank Accounts

Checking Account with Account No.

Checking Account with Account No.

Checking Account with Account No.

Savings Account with Account No.

Savings Account with Account No.

Savings Account with Account No.

Location of Bank Book(s)

Location of cancelled checks

Personal Banker

Securities

Location of stocks and bonds

Location of records of purchase and sale

Investment advisor

Government Bonds

Location of bonds

Co-owner

Beneficiary

Location of list of bonds (with serial no. and denomination)

Real Estate

Location of deed

Title in name of

Mortgagor

Location of copy of mortgage

Location of copy of survey

Location of tax receipts

Location of records of other real estate holdings

Life Insurance

Location of policies

Company

Policy No. Face Value

Company

Policy No. Face Value

Company

Policy No. Face Value

Loans against policies

Miscellaneous Insurance

Location of policies

Medical/Disability Policy No.

Real Estate Policy No.

Automobile Policy No.

Personal Possessions Policy No.

Trust Funds

For the benefit of

Date established

Agreement located at

Trustees