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# W223 Important Information - Household Records

The University of Tennessee Agricultural Extension Service

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Recommended Citation
"W223 Important Information - Household Records," The University of Tennessee Agricultural Extension Service, W223 07/09 10-0013, http://trace.tennessee.edu/utk_agexfinman/30

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# Important Information

The _____Household

_____
Date Prepared

Taking time to organize your important papers and records may be the best investment you ever made. Completing the document will:

- Help you organize and document your household and personal records.
- Serve as a ready resource for you when you need to access important documents or information.
- Provide important information to a friend or family member who might need to take care of your affairs in an emergency.

After you've completed this document for your home files, make sure that every adult member of the household can locate it if needed. Prepare duplicates for one or more of the following:

- Your safe deposit box
- Safekeeping with a trusted friend or family member
- A grab-and-go bag for evacuation. (See UT Extension Publication W224 for instructions on how to assemble.)

Review and revise this information annually or as needed to update the information.

***Developed by***
***Dena Wise, Ph.D., Professor, Family & Consumer Sciences***
***Ann A. Berry, Ph.D., Associate Professor, Family & Consumer Sciences***

## Family Members

| Name | Date of Birth | Place of Birth | Social Security Number |
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## Emergency Contacts Not Residing with the Family

| Name | Address - Phone Number - E-mail |
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## Powers of Attorney *(Health care, financial power of attorney )*

| Principal | Agent | Agent Address - Phone Number - E-mail |
|---|---|---|
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## Executors of Wills

| Testator | Executor | Executor Address - Phone Number - E-mail |
|---|---|---|
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## Family Advisers *(Clergy, doctors/specialty, dentists, veterinarians, accountants, bankers, brokers, financial advisors, attorneys, insurance agents/ type of policy)*

| Family Member | Advisor | Advisor Address - Phone Number - E-mail |
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## Family Advisers *(cont)*

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## Employment/Military Records

| Family Member | Dates of Employment | Name of Employer/ Contact Information | Other Information (Circumstances of Separation, Recognition, Location of Military Records |
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## Education History

| Family Member | School Attended/Contact Information | Dates Attended | Diploma/ Certificate/Degree |
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## School Records *(Immunization records, report cards, standardized test results, diagnostic test results)*

| Family Member | Type of Record Test | Other Information (Date, Service Provider, Location of Records, Follow-up) |
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**Banking Information** ***(Checking account, savings account, money market account, certificates of deposit, trust accounts, safe deposit box, other. A list of accounts [including online accounts] with PINs for transactions should be stored in a safe deposit box.)***

| Name and Address of Financial Firm | Account or ID Number | In Whose Name(s) |
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## Personal Financial Investments *(Personal IRAs or Roths, education saving accounts, savings bonds, government securities, mutual funds, stocks, bonds, other)*

| Investment | Account Number | Name of Contact | Estimated Value | Other Information (Name of Owner, Number of Shares, Maturity Date) |
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## Pensions or Employee Retirement Plans *(Include 401K, 403B, 457, Roth, SEP, SIMPLE or KEOGH)*

| Type of Account | Account Holder | Employer or Investment Company | Account Number | Dates Enrolled | Estimated Current Value | Estimated Monthly Payout |
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## Real Estate *("Type of Ownership" refers to the legal form of ownership, such as tenancy in common or joint tenancy.)*

| Kind of Property | Address or Location | Name(s) of Owner(s) | Type of Ownership | Date Acquired | Purchase Price |
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## Business Interests *("Held as" refers to whether you hold the business as sole owner or in a partnership or corporate arrangement.)*

| Business | Contact Name & Information | Your Position in the Company | Held As | Date Acquired | Estimated Value of Your Interest |
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## Other Personal Property *(Autos, boats, mobile homes, RVs and other items of value [jewelry, antiques, books, collections, royalties, patents, etc.]. Attach photos, video and electronic records and descriptions as appropriate.)*

| Name of Asset | Date Acquired | Purchase Value | Other Useful Information (Name of Owner, VIN Number, Appraisals, etc.) |
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## Property Insurance *(Real estate, automobiles, other personal property, personal liability, other)*

| Insurer | Amount of Coverage | Policy Number | Contact Information |
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## Life Insurance and Annuities *(Term, whole life, endowment, family income, etc. If owner of policy is not the person insured, give both names. )*

| Policy Owner/Person(s) Insured | Type of Policy | Insurer | Policy Number | Face Value | Beneficiaries/ Percentages |
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**Health Insurance** ***(Health and hospitalization, dental, vision, prescription drugs, disability, long-term care. Include employer plans, Medicare, Medicaid [or other government plans – accidental, major medical, special coverage and high-deductible plans.] List prescription drugs and pharmacy for each family member in table below.)***

| Insurer | Person(s) Insured | Policy Number | Contact for Authorization Phone/Internet Address | Other Information (amount of deductible, co-pays, out-of-pocket limits, etc.) |
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## Prescription Medications

| Family Member | Medication/ Dosage | Pharmacy | Prescription Number | Insurer |
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## Debit, Credit and Charge Cards *(A list of debit, credit and charge card numbers along with PINs and online account information should be kept in a safe deposit box.)*

| Card | Authorized User(s) | Date Opened | Phone Number |
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**Financial Obligations** ***(First/second mortgages, home equity loans, other real estate loans, rental agreements, auto loans, educational loans, debt consolidation loans, personal property loans, loans from retirement funds or life insurance, child support, alimony, loans from family/friends, other)***

| Creditor/Contact Information | Monthly Payment/ Due Date | Anticipated Payoff Date | Automatic Draft? (√) | Account for Draft |
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## Financial Obligations *(cont)*

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## Service Providers *(Utilities, telephones/cell phones, cable, Internet, pest control, cleaning, lawn care, other)*

| Service | Company/Contact Information | Term of Contract | Other Information (Frequency, Cost, Deposit, etc.) |
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## Employer Flexible Benefits Plans *(Health savings, dependent care)*

| Type of Plan | Employer/Contact Information | Monthly Contribution |
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## Locations of Important Items

| Name of Family Member | Location for Each Family Member | | | | | | |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| ATM cards | | | | | | | |
| Emergency contact information | | | | | | | |
| Medical information (blood type, allergies, diseases, hospital & doctor preferences) | | | | | | | |
| Debit cards | | | | | | | |
| Credit cards used regularly (list location of other credit cards below) | | | | | | | |
| Purchase or gift cards | | | | | | | |
| Health insurance cards | | | | | | | |
| Membership cards (AAA, AARP, purchase club, health club, etc.) | | | | | | | |
| Personal professional identification cards | | | | | | | |
| | | | | | | | |
| Drivers' licenses | | | | | | | |
| Auto registration | | | | | | | |
| Proof of auto insurance | | | | | | | |

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|---|---|---|---|---|---|---|---|
| Social Security card | | | | | | | |
| Employment records | | | | | | | |
| Resumes and/or vitae | | | | | | | |
| Copies of diplomas, professional certificates & licenses | | | | | | | |
| Immunization records | | | | | | | |
| School records | | | | | | | |
| Copies of military service and discharge papers | | | | | | | |
| Organizational membership records | | | | | | | |
| | | | | | | | |
| Service contracts | | | | | | | |
| Guarantees & warrantees | | | | | | | |
| | | | | | | | |
| Current bills | | | | | | | |
| Payment records | | | | | | | |
| | | | | | | | |
| Net worth statements | | | | | | | |
| Tax records | | | | | | | |
| Paycheck stubs | | | | | | | |
| Employee reimbursement records | | | | | | | |
| Record of flexible benefit contributions & reimbursements | | | | | | | |
| Record of insurance claims & payments | | | | | | | |
| | | | | | | | |
| Credit reports | | | | | | | |
| Consumer loan agreements | | | | | | | |
| Mortgage loan agreements | | | | | | | |
| Chapter 13 bankruptcy plan | | | | | | | |

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|---|---|---|---|---|---|---|---|
| Credit cards not often used | | | | | | | |
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| Child support or alimony court orders | | | | | | | |
| Record of child support or alimony payment | | | | | | | |
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| Wills & estate plans | | | | | | | |
| Trusts | | | | | | | |
| Powers of attorney | | | | | | | |
| | | | | | | | |
| Birth certificates | | | | | | | |
| Marriage certificates | | | | | | | |
| Death certificates | | | | | | | |
| Adoption papers | | | | | | | |
| Divorce decrees & agreements | | | | | | | |
| Pre-nuptial agreements | | | | | | | |
| Citizenship papers | | | | | | | |
| Military service records | | | | | | | |
| | | | | | | | |
| Employment contracts & business agreements | | | | | | | |
| Bankruptcy discharge papers | | | | | | | |
| | | | | | | | |
| Insurance policies | | | | | | | |
| Real estate deeds | | | | | | | |
| Vehicle titles | | | | | | | |
| Stock, bond & other investment certificates | | | | | | | |
| Jewelry & precious metals (certificates or items) | | | | | | | |
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|---|---|---|---|---|---|---|---|
| Videotape inventory of home contents | | | | | | | |
| Web addresses, log-in and password information for online accounts | | | | | | | |
| List of debit, credit and charge cards with account numbers and contact information | | | | | | | |
| Other | | | | | | | |
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## Recommended Locations for Important Documents

| **Carry With You** | |
|---|---|
| Drivers' licenses | Personal contact information |
| Personal professional identification cards | Emergency contact information (friend or relative) |
| ATM | Organizational membership cards you use regularly (AAA, AARP, purchase club, etc.) |
| Debit cards | Auto registration |
| Credit cards you use regularly | |
| Other purchase or gift cards | |
| Health insurance cards | |
| Medical information (blood type, allergies, diseases, hospital & doctor preferences) | |

| **Home File** | |
|---|---|
| Employment records | Saving & spending plan |
| Resumes and/or vitae | Spending records |
| Copies of diplomas, professional certificates & licenses | Paycheck stubs |
| Immunization and school records | Credit reports |
| Copies of military service and discharge papers | Employee reimbursement records |
| Tax records | Record of insurance claims & payments |
| Guarantees & warrantees | Record of flexible benefit contributions & reimbursements |
| Service contracts | Consumer loan agreements |
| Organizational membership records | Mortgage loan agreements |
| Current bills | Chapter 13 bankruptcy plan |
| Payment records | Child support or alimony court orders |
| Net worth statements | Credit cards not often used |
| Social Security cards | |

| **Safe Deposit Box** | |
|---|---|
| Wills & estate plans | Pre-nuptial agreements |
| Trusts | Bankruptcy discharge papers |
| Powers of attorney | Citizenship papers |
| Insurance policies | Military service records |
| Birth certificates | Real estate deeds |
| Marriage certificates | Vehicle titles |
| Death certificates | Stock, bond & other investment certificates |
| Adoption papers | Videotape inventory of home contents |
| Divorce decrees & agreements | Jewelry & precious metals |
| Employment contracts & business agreements | Lists of debit, credit and charge cards with account numbers |
| Web addresses, log-in and password information for all online transactions | |

## References:

"Where Are Your Valuable Papers?" Oregon State University Extension Service. Reprinted November, 1999.
"Family Records." Cooperative Extension Service, Institute of Food & Agricultural Sciences. Torres, Nayda. Reprinted May, 2003.
"Organize Your Important Papers," "Record of Important Papers." From eXtensionCommunities. Internet address: http://cop.extension.org/wiki. Retrieved September 21, 2006.

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W223 07/09 10-0013
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