

What My Family Should Know

READY REFERENCE:

Mobile / Phone (Self) : _____.

| | | Name | Office address | Residence address | Mobile / Contact number |
|---|----------------------------|------|----------------|-------------------|-------------------------|
| A | Family Doctor | | | | |
| B | Specialist Doctor (if any) | | | | |
| C | Tax Consultant | | | | |
| D | Insurance Agent | | | | |
| E | Stock Broker | | | | |

DOCUMENTS DETAILS:

| | | Number | Expiry date |
|---|--|--------|-------------|
| A | Passport | | |
| B | Driving license | | |
| C | Credit Cards / ATM Cards | | |
| D | Club Membership Professional Others | | |
| E | Vehicle Details | | |
| F | Income Tax PAN No. | | |
| G | Aadhar Card | | |

LOCATION OF IMPORTANT DOCUMENTS

| | |
|---------------------------|--|
| A. Personal Will | |
| B. Spouse's Will | |
| C. Insurance Policies | |
| D. Invest. Papers | |
| E. Property Records | |
| F. Birth Certificate | |
| G. Marriage Certificate | |
| H. Domicile Certificate | |
| I. Important Agreements | |
| J. Other Important Papers | |

Insurance - LIC Policy Details

| Sr. No. | Name/ Nominee | Policy No./Issuing Office | Amt. Insured | Issue Date/Maturi ty Date | Table & Term | Premium | Remarks |
|---------|------------------|------------------------------|-----------------|--|--------------------|---------|---------|
| 1. | Nominee- | Through Mr. | | <i>Date of last payment</i> Date of Maturity | | | |
| 2. | Nominee- | Through Mr. | | <i>Date of last payment</i> Date of Maturity | | | |
| 3. | Nominee- | Through Mr. | | <i>Date of last payment</i> Date of Maturity | | | |

Medi Claim Policy Details

| Sr. No. | Name & Type of Policy | Policy No./Previous Policy No. | Amt. Insured | Issue Date/Maturity Date | Premium | Remarks |
|---------|-----------------------|--------------------------------|--------------|--------------------------|---------|---------|
| 1. | Floater Policy | | | | | |
| 2. | | | | | | |

Vehicle Insurance Policy Details

| Sr. No. | Name/Vehicle | Policy No./Issuing Office | Amt. Insured | Issue Date/Maturity Date | Premium | Remarks |
|---------|---|---------------------------|--------------|--------------------------|---------|---------|
| 1. | Reg. No. Model Name & No. Engine No. Chassis No. Mfg Yr. CC- Nominee- Agent Name & Mobile No. | | | Valid till | | |
| 2. | | | | | | |
| 3. | | | | | | |

FIRE / BURGLARY INSURANCE DETAIL:

| Sr. No. | Name of the Property / Nominee | Policy No./ Issuing Office | Amt. Insured | Issue Date/Maturity Date | Risks covered | Premium (Rs.) | Remarks |
|---------|--------------------------------|----------------------------|--------------|--------------------------|---------------|---------------|---------|
| 1. | | | | | | | |
| 2. | | | | | | | |

SHARES/UNITS/DEBENTURES/BONDS: Standing in own name or Jointly with

| Company | No. of Shares | Demat A/c. No. | Demat Bank details | Demat Statement location | Held Singly / Jointly |
|----------------|----------------------|-----------------------|---------------------------|---------------------------------|------------------------------|
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LOCKERS

| Bank Name & Branch | Locker No. | In the Name of | Code | Rent (Rs.) | Rent Renewal Date | Nominee | Contents |
|-------------------------------|-------------------|-----------------------|-------------|-------------------|--------------------------|----------------|-----------------|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

PUBLIC PROVIDENT FUND (PPF)

| Bank Name & Branch | Fvg. | PPF A/c. No. | Maturity Date | Nominee/s |
|--------------------|------|--------------|---------------|-----------|
| | | | | |
| | | | | |
| | | | | |

Pension A/c.

| Bank Name & Branch | Type of Account & Pension A/c. No. | Operating Instructions | Pension Payment Order No. | Nominee/s | Due Date for Live Certificate | Signature |
|--------------------|------------------------------------|------------------------|---------------------------|-----------|-------------------------------|-----------|
| 1. | | | | | | |

ATM / Debit Card Details

| Sr. No. | Name | SB A/c. No. / Bank & Branch | ATM / Debit Card No. | Issue Date | Valid Thru | CVV No. | Remarks |
|---------|------|-----------------------------|----------------------|------------|------------|---------|---------|
| 1. | | | | | | | |
| 2. | | | | | | | |
| 3. | | | | | | | |
| 4. | | | | | | | |
| 5. | | | | | | | |
| 6. | | | | | | | |
| 7. | | | | | | | |

Credit Card Details

| Sr. No. | Name | Bank's Name | ATM / Credit Card No. | Valid From | Valid Thru | CVV No. | Remarks / T-Pin |
|---------|------|-------------|-----------------------|------------|------------|---------|-----------------|
| 1. | | | | | | | |
| 2. | | | | | | | |
| 3. | | | | | | | |
| 4. | | | | | | | |
| 5. | | | | | | | |

PANCARD Details

| Sr. No. | Name | Father's/ Husband Name | PANCARD No./Issue Dt. | Contact Details |
|---------|------|------------------------|-----------------------|-----------------|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |

Passport Details

| Sr. No. | Name | Passport No. | Issue Dt. | Expiry Date | Issuing Authority | Previous Passport Details |
|---------|------|--------------|-----------|-------------|-------------------|---------------------------|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Electricity Details

| Sr. No. | Name | House Details | Meter No. | Customer No. | Deposit Rs. | Remarks |
|---------|------|---------------|-----------|--------------|-------------|---------|
| 1. | | | | | | |
| 2. | | | | | | |

Gas Pipe Line Details

| Sr. No. | Name | House Details | Meter No/Route No | Consumer No/Khata No. | Deposit Rs. | Remarks |
|---------|------|---------------|-------------------|-----------------------|-------------|---------|
| 1. | | | | | | |

Gas Cylinder Agency Service Details -

| Sr. No. | Name | House Details | Consumer No. | IOC Serial No. | Deposit Rs. | Remarks |
|---------|------|---------------|--------------|----------------|-------------|---------|
| 1. | | | | | | |

BSNL Land Line Details

| Sr. No. | Name | House Details | Phone No. | Customer ID/Account No. | Deposit LL/ Broad Band Wi FI Rs. | Remarks |
|---------|------|---------------|-----------|-------------------------|----------------------------------|---------|
| 1. | | | | | | |

Driving License Details

| Sr. No. | Name | Driving License No. / Licencing Authority | Issue Date/CDOI | Valid Details / Valid From | Valid Till | Remarks / Blood Group |
|---------|------|---|-----------------|----------------------------|------------|-----------------------|
| 1. | | | | | | |
| 2. | | | | | | |
| 3. | | | | | | |
| 4. | | | | | | |

Ration Card Details

| Sr. No. | Name | Ration Card No./Issuing Authority | Issue Date | Remarks |
|---------|------|-----------------------------------|------------|---------|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |

Aadhar Card - UID Details

| Sr. No. | Name | Aadhar Card No./ Enrollment No. | Issue Date | Remarks |
|---------|------|---------------------------------|------------|---------|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |

Election Identity Card - Details

| Sr. No. | Name | Father's/Husband's Name | Identity Card No. | Issue Date |
|---------|------|-------------------------|-------------------|------------|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |

HOUSE PROPERTY:

| Property Detail & standing in the name of: | How acquired (Inherited / Loan) Bank Loan Detail: Loan Amt. Inst. Amt. O/s. Amt. | Registration No. / Share Certificate No. | Nominee if any | Property Card No. and valid upto | House Tax (Rs.) | Next Due Date of House Tax | Ins. Policy No., Amt. & Due Date | Risk/s covered | Mortgage with Bank Name & Branch / Place of Docs. |
|--|--|--|----------------|----------------------------------|-----------------|----------------------------|----------------------------------|----------------|---|
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

House Tax Details:

| Sr. No. | Name | House Details | Census No. | Property Identification No. (PIN) | Construction Sq. Mtrs. | Remarks |
|---------|------|---------------|------------|-----------------------------------|------------------------|---------|
| 1. | | | | | | |
| 2. | | | | | | |

INCOME TAX

| Permanent Account No. | Ward No. and Office Address | Last Return Filed | File No. |
|-----------------------|-----------------------------|-------------------|----------|
| | | | |

WILL:

My will is executed on : _____

Copy of the will is kept at: _____

POWER OF ATTORNEY :

- ❖ Power of Attorney executed for Wife/Son/Others
- ❖ My Power of Attorney is
- ❖ Deed Executed on:
- ❖ Details kept in File No.

MY DEBT / LIABILITIES :

(a) I am guarantor of Mr.

Give complete details:

1.

2.

(b) I have borrowed from :
(Give complete details)

(c) Other Liabilities

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