

# PERSONAL RECORDS

OF

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Confidential personal records to assist in handling  
our affairs in the event of an emergency.

Dated \_\_\_\_\_

Revised \_\_\_\_\_

# PERSONAL RECORDS

These are required for insurance purposes, Social Security and in many other cases where legal proof of age, relationship or place of birth are required.

	HIS	HERS
Date of Birth _____		
Place of Birth _____		
Location of Birth Records _____		
Married to _____		
Date of Marriage _____		
Married at _____		
Marriage Records located at _____		

## PARENTS

FATHER		
Date of Birth _____		
Place of Birth _____		
Date of Death _____		
Buried at _____		
MOTHER		
Date of Birth _____		
Place of Birth _____		
Date of Death _____		
Buried at _____		

## REAL ESTATE

WE OWN REAL ESTATE LOCATED AT \_\_\_\_\_

\_\_\_\_\_

THE MORTGAGE HOLDER IS \_\_\_\_\_

INSURANCE COVERAGE ON THE REAL ESTATE IS WITH \_\_\_\_\_

INSURANCE POLICIES ARE LOCATED \_\_\_\_\_

\_\_\_\_\_

## SECURITIES AND STOCK

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

OUR BROKER IS \_\_\_\_\_

\_\_\_\_\_

## LIFE INSURANCE

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

OUR AGENT IS \_\_\_\_\_

## HOSPITAL & MEDICAL INSURANCE

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# SAFETY DEPOSIT BOX

LOCATION \_\_\_\_\_ BOX NUMBER \_\_\_\_\_

KEY IS LOCATED \_\_\_\_\_

## OUR WILL

LOCATION \_\_\_\_\_ PREPARED BY \_\_\_\_\_

## MILITARY SERVICE

BRANCH OF SERVICE \_\_\_\_\_

COUNTRY \_\_\_\_\_

DATES OF COMPLETE SERVICE \_\_\_\_\_

TYPE OF DISCHARGE \_\_\_\_\_

SERVICE CONNECTED DISABILITIES \_\_\_\_\_

MILITARY RECORDS & DISCHARGE PAPERS ARE LOCATED \_\_\_\_\_

## EMPLOYMENT

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## ASSETS

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PERSONAL PROPERTY

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CREDIT CARDS

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LEGAL MATTERS PENDING

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TAX RECORDS & RETURNS

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BURIAL INFORMATION

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MEMBERSHIP IN ORGANIZATIONS

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