

What My Family Should Know

A GUIDE FOR GETTING YOUR AFFAIRS IN ORDER

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COURTESY:



FRIENDS OF ELDERLY

Healthy Happy & Busy

What My Family Should Know



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ONLINE DETAILS:

	WEB (Mail, Bank, Gpay, Paytm, WI-FI, Social media, etc.)	LOGIN	PASSWORD *
A			
B			
C			
D			
E			
F.			
G.			
H.			
I.			
J.			
K.			
L.			
M			
N			
O			

*** Better to inform your passwords to family member orally and make them remember, instead of writing them...**

What My Family Should Know



KEY CONTACTS:

		Name	address	Contact number
A	Family Doctor			
B	Specialist Doctor (if any)			
C	Tax Consultant			
D	Insurance Agent			
E	Stock Broker			
F.				

DOCUMENTS DETAILS:

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

What My Family Should Know



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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	

Life Insurance Policy Details:

Sr. No.	Name / Nominee	Policy No./ Issuing Office	Amount Insured	Issue Date / Maturity Date	Term	Premium	Remarks
1.							
2.							
3.							
4.							

Medi Claim Policy Details:

Sr. No.	Name & Type of Policy	Policy No.	Amount Insured	Issue Date / Maturity Date	Premium	Remarks
1.						
2.	Floater Policy					

Vehicle Insurance Policy Details:

Sr. No.	Name / Vehicle	Policy No./ Issuing Office	Amount Insured	Issue Date / Maturity Date	Premium	Remarks
1.	Reg. No. Model Name Engine No. Chassis No. Mfg. Yr. Agent Name & Mobile No.					
2.	Reg. No. Model Name Engine No. Chassis No. Mfg. Yr. Agent Name & Mobile No.					
3.	Reg. No. Model Name Engine No. Chassis No. Mfg. Yr. Agent Name & Mobile No.					

What My Family Should Know



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

ATM / Debit Card Details:

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

What My Family Should Know



Credit Card Details:

Sr. No.	Name	Bank's Name	ATM / Credit Card No.	Valid From	Valid Thru	CVV No.	Pin
1.							
2.							
3.							
4.							
5.							

PAN Card Details:

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

Passport Details:

S. No.	Name	Passport No.	Issue Date	Expiry Date	Issuing Authority	Previous Passport Details

Electricity Details:

S. No.	Consumer Name	House No.	Consumer No.	Remarks
1.				
2.				
3.				
4.				
5.				

What My Family Should Know



Gas Pipe Line Details:

S. No.	Consumer Name	House No.	Consumer No.	Remarks
1.				
2.				

Gas Cylinder Agency Service Details:

Sr. No.	Name	House Details	Consumer No.	Remarks
1.				
2.				

BSNL Land Line Details:

Sr. No.	Name	House Details	Phone No.	Customer ID / Account No.	Remarks
1.					
2.					

Driving License Details:

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

Ration Card Details:

S. No.	Name	Ration Card No. / Issuing Authority	Issue Date	Remarks
1.				
2.				
3.				
4.				
5.				

What My Family Should Know



House Tax Details:

Sr. No.	Name	House Details	Census No.	Property Identification No. (PTIN)	Construction Sq. Mtrs.	Remarks
1.						
2.						
3.						
4.						

INCOME TAX

Permanent Account No. (PAN)	Ward No. and Office Address	Last Return Filed	Remarks

What My Family Should Know



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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:

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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What My Family Should Know



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MY RECEIVABLES:

A series of horizontal dotted lines spanning the width of the page, intended for handwritten notes or receipts.

What My Family Should Know

Although many of us are efficient in our daily lives and keep meticulous records in our professions, most of us leave inadequate and incomplete records of our economic and personal affairs when we depart.

When and how your benefits will be paid and how your assets will be settled are many questions that must be answered.

This book has been compiled to record the necessary facts for your family, your attorney and your executor.

We suggest you complete this book and store it in a safe place so that it will be available for possible revisions by you and later use by your family. It is not recommended that you keep this guide in your safety deposit box since most are sealed after death unless you have a joint account.

WE ARE



FRIENDS OF ELDERLY

Healthy Happy & Busy

Managing Board

Jaishree Baheti

Chairperson
92929 05001

Shivprasad Chandak

Managing Director
99121 91123

Jagdish Darak

Treasury Director
92465 25992

Indira Bajaj

Jt. Managing Director
92996 00471

Advisory Board

Dr. Suman Kabra (Dean - BITS)

Sri CA S.K. Kabra

Sri Murlidhar Jhanwar

Smt. Pushpa Boob

Sri Naval Kishore Baheti