

My Family Record Book



Keep all personal and financial detail of your family
in one place which your family should know.

Family Detail

Detail	First Name	Middle Name	Last Name	DOB (DD-MM-YYYY)
Self				
Spouse				
Kid - 1				
Kid - 2				
Kid - 3				
Father				
Mother				

Passport

Name			
Passport No.		Expiry Date	

Name			
Passport No.		Expiry Date	

Name			
Passport No.		Expiry Date	

Name			
Passport No.		Expiry Date	

Name			
Passport No.		Expiry Date	

PAN, Aadhar, Driving Licence

Name	Aadhar	P.A.N.	Driving Licence No

Home & Utilities

Service	Agency / Name	Registration No	Phone Number
Electricity			
Gas			
Internet - Home wifi			
Plumber			
Electrician			

Details of Professionals & Consultants



Family Doctor

Name		City	
Address			
Phone No		Pin Code	
Email Address		Note	

Chartered Accountant

Name		City	
Address			
Phone No		Pin Code	
Email Address		Note	

Lawyer

Name		City	
Address			
Phone No		Pin Code	
Email Address		Note	

Life Insurance Agent

Name		City	
Address			
Phone No		Pin Code	
Email Address		Note	

Health Insurance Agent

Name		City	
Address			
Phone No		Pin Code	
Email Address		Note	

Vehicle Insurance Agent

Name		City	
Address			
Phone No		Pin Code	
Email Address		Note	

Mutual Fund Distributor

Name		City	
Address			
Phone No		Pin Code	
Email Address		Note	

Tax Consultant

Name		City	
Address			
Phone No		Pin Code	
Email Address		Note	

Stock Broker

Name		City	
Address			
Phone No		Pin Code	
Email Address		Note	

Other _____

Name		City	
Address			
Phone No		Pin Code	
Email Address		Note	

Other _____

Name		City	
Address			
Phone No		Pin Code	
Email Address		Note	

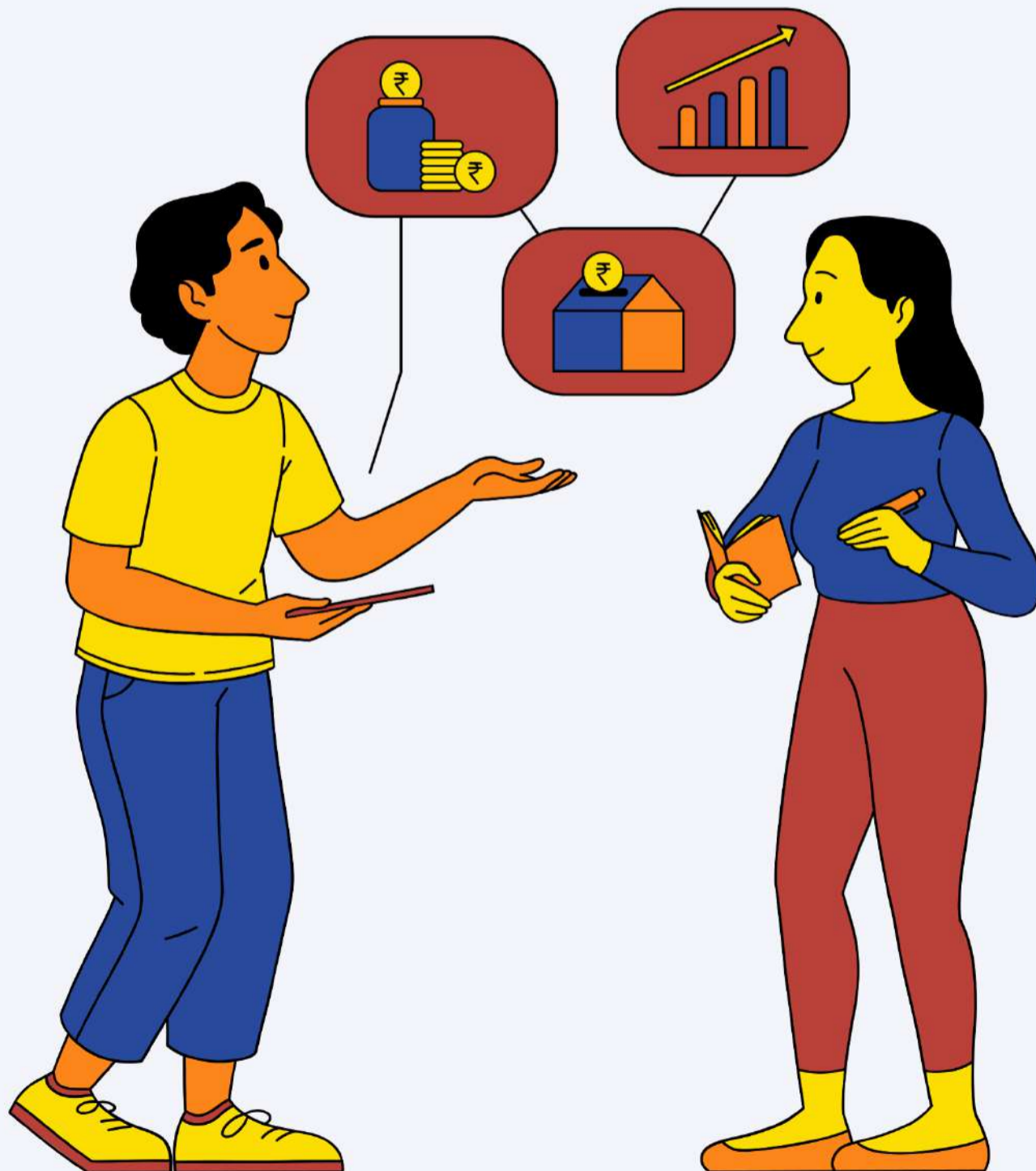
Other _____

Name		City	
Address			
Phone No		Pin Code	
Email Address		Note	

Records & Storage

Document	Location
Birth Certificate	
Educational Certificate	
Marriage Certificate	
Death Certificate	
Tax Documents - ITRs	
Loan Documents	
Property Documents	
Vehicle Documents	
Warranty cards / Bills of home appliances	
Medical Records	
Electricity Bill	
Gas Bill	
Municipal Property tax bills	
Life Insurance Policies	
Health Insurance Policies	
Mutual Fund Statements	
Fixed Deposit & Other Investment	
DP & Stock Broking documents & Bills	

Investments & Assets





Bank Account Records

Name of Account Holder	Bank Name , Branch	Account No	Customer ID	Password

Credit Card Detail

Name of Account Holder	Issuer	Card No	PIN No.	Expiry

Fixed Deposit / Bonds

Sr No	FDR 1	FDR 2	FDR 3
Issuer Bank / Company			
FDR Number			
Date of deposit			
Investor Name			
1st Holder			
2nd Holder			
Nominee			
Maturity Date			
Maturity amount			
Type of FDR			

Sr No	FDR 4	FDR 5	FDR 6
Issuer Bank / Company			
FDR Number			
Date of deposit			
Investor Name			
1st Holder			
2nd Holder			
Nominee			
Maturity Date			
Maturity amount			
Type of FDR			

Fixed Deposit / Bonds

Sr No	FDR 7	FDR 8	FDR 9
Issuer Bank / Company			
FDR Number			
Date of deposit			
Investor Name			
1st Holder			
2nd Holder			
Nominee			
Maturity Date			
Maturity amount			
Type of FDR			

Sr No	FDR 10	FDR 11	FDR 12
Issuer Bank / Company			
FDR Number			
Date of deposit			
Investor Name			
1st Holder			
2nd Holder			
Nominee			
Maturity Date			
Maturity amount			
Type of FDR			

Life Insurance Policy

Sr No	Life Insurance Policy 1	Life Insurance Policy 2	Life Insurance Policy 3
Insured Person			
Insurer			
Policy No			
Sum Assured			
Policy Term			
Product name			
Premium Amount			
Premium Frequency			
Nominee Name			
Location of Policy Doc			

Sr No	Life Insurance Policy 4	Life Insurance Policy 5	Life Insurance Policy 6
Insured Person			
Insurer			
Policy No			
Sum Assured			
Policy Term			
Product name			
Premium Amount			
Premium Frequency			
Nominee Name			
Location of Policy Doc			

Life Insurance Policy

Sr No	Life Insurance Policy 7	Life Insurance Policy 8	Life Insurance Policy 9
Insured Person			
Insurer			
Policy No			
Sum Assured			
Policy Term			
Product name			
Premium Amount			
Premium Frequency			
Nominee Name			
Location of Policy Doc			

Sr No	Life Insurance Policy 10	Life Insurance Policy 11	Life Insurance Policy 12
Insured Person			
Insurer			
Policy No			
Sum Assured			
Policy Term			
Product name			
Premium Amount			
Premium Frequency			
Nominee Name			
Location of Policy Doc			

Health Insurance Policy - Individual

Sr No	Health Insurance 1	Health Insurance 2
Insured Person		
Insurer		
Policy No		
Sum Assured		
Product name		
Premium Amount		
Premium Frequency		
Nominee Name		
Location of Policy Doc		

Sr No	Health Insurance 3	Health Insurance 4
Insured Person		
Insurer		
Policy No		
Sum Assured		
Product name		
Premium Amount		
Premium Frequency		
Nominee Name		
Location of Policy Doc		

Health Insurance Policy - Floater

Sr No	Health Insurance 1	Health Insurance 2
Insured Person 1		
Insured Person 2		
Insured Person 3		
Insured Person 4		
Insurer		
Policy No		
Sum Assured		
Product name		
Premium Amount		
Premium Frequency		
Nominee Name		
Location of Policy Doc		

Mutual Fund Investment

Investor Name	Scheme Name	Folio No	Lumpsum Inv	SIP Amount

Mutual Fund Investment

Login URL			
Login ID		Password	
Mobile		Email	

Stock Broking

Sr No	Acc -1	Acc -2	Acc 3
Name			
DP Name			
Demant Acc No			
Mail ID			
Mobile No			

Sr No	Acc -1	Acc -2	Acc 3
Name			
DP Name			
Demant Acc No			
Mail ID			
Mobile No			

DP Login

Sr No	CAS ID	Plan
NSDL CAS Login		
CDSL CAS Login		

Property & Precious Metals



Immovable Property

Address of Property			
Society's Share Certificate Number		Nominee(s)	
1st Name of Owner			
2nd Name of Owner			
Insurance Policy No		Type of Property	
Insurance Issuer		Morgage Detail	

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1st Name of Owner			
2nd Name of Owner			
Insurance Policy No		Type of Property	
Insurance Issuer		Morgage Detail	

Vehicle

Detail	Vehicle 1	Vehicle 2	Vehicle 3
Type (2 or 4 wheeler)			
Name Of company & model			
Registration No			
Registration Date			
RC book kept at			
Insurance issuer			
Insurance Policy No			
Owned By (Name of owner)			

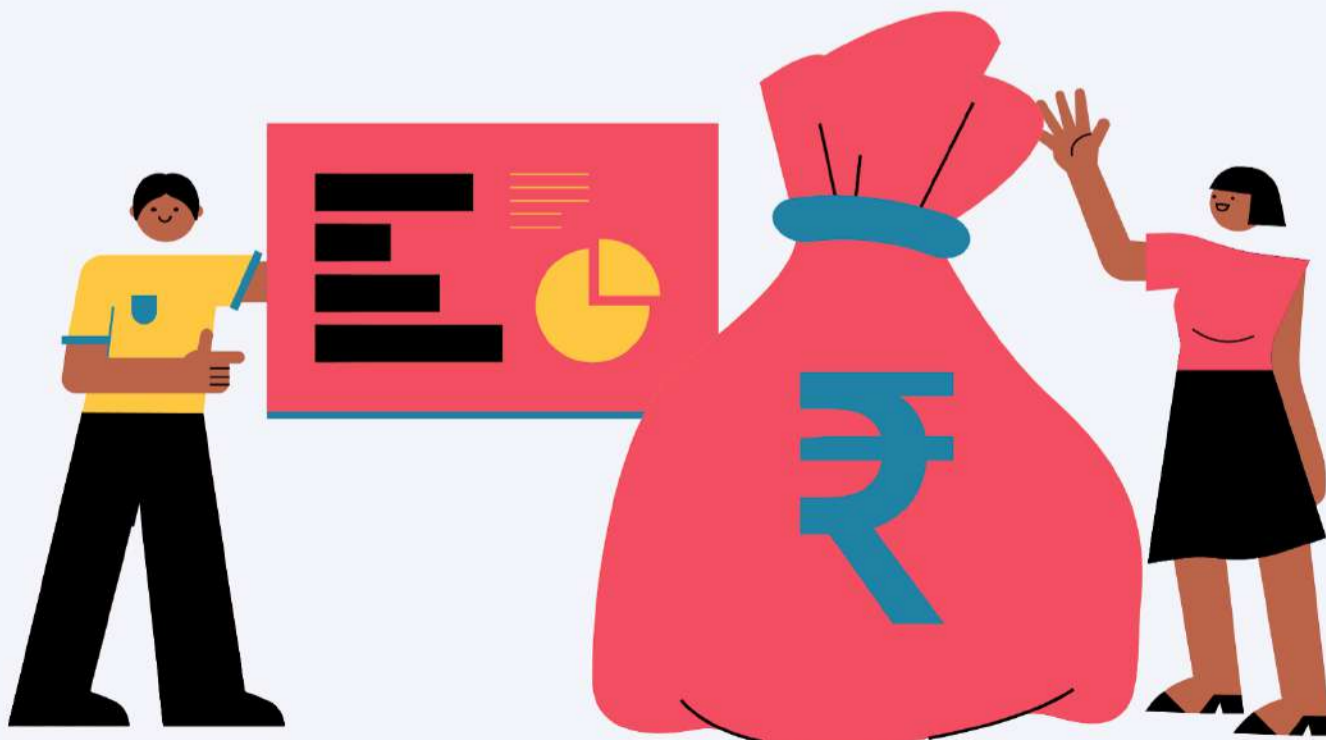
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Type (2 or 4 wheeler)			
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Insurance Policy No			
Owned By (Name of owner)			

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Type (2 or 4 wheeler)			
Name Of company & model			
Registration No			
Registration Date			
RC book kept at			
Insurance issuer			
Insurance Policy No			
Owned By (Name of owner)			

Liabilities & Loans



Home Loan

Lender	Loan account Number	Loan Amount	Loan Tenure	EMI

Personal Loan

Lender	Loan account Number	Loan Amount	Loan Tenure	EMI

Car Loan

Lender	Loan account Number	Loan Amount	Loan Tenure	EMI

Other Loan

Lender	Loan account Number	Loan Amount	Loan Tenure	EMI

Will:

My will is executed on :	
Copy of the will is kept at:	
Executor of my will is - Name	
Executor's Mobile number	

Notes:

Notes:

Notes:

Notes: