

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.

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Family Members

Name	Date of Birth	Place of Birth	Social Security Number

Emergency Contacts Not Residing with the Family

Name	Address - Phone Number - E-mail

Powers of Attorney *(Health care, financial power of attorney)*

Principal	Agent	Agent Address - Phone Number - E-mail

Executors of Wills

Testator	Executor	Executor Address - Phone Number - E-mail

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

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.)

Property Insurance (Real estate, automobiles, other personal property, personal liability, other)

Insurer	Amount of Coverage	Policy Number	Contact Information

Prescription Medications

Family Member	Medication/ Dosage	Pharmacy	Prescription Number	Insurer

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

Employer Flexible Benefits Plans *(Health savings, dependent care)*

Type of Plan	Employer/Contact Information	Monthly Contribution

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							

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 & warranties							
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							

Credit cards not often used							
Child support or alimony court orders							
Record of child support or alimony payment							
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)							

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							

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 & warranties	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>.

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Programs in agriculture and natural resources, 4-H youth development, family and consumer sciences, and resource development.

University of Tennessee Institute of Agriculture, U.S. Department of Agriculture and county governments cooperating.

UT Extension provides equal opportunities in programs and employment.