

## My Family Record Book



Keep all essential personal and financial details of your family at one secure place. This handwritten record book serves as a reliable backup, ensuring that crucial information is available & easily accessible to your loved ones. Perfect for safeguarding your family's financial legacy and providing peace of mind.



# MY FAMILY Record Book

## 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 |  |

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|--------------|--|-------------|--|
| Name         |  |             |  |
| Passport No. |  | Expiry Date |  |

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|--------------|--|-------------|--|
| Name         |  |             |  |
| Passport No. |  | Expiry Date |  |



# MY FAMILY Record Book

## PAN, Aadhar, Driving License

| Name | Aadhar | P.A.N. | Driving License No |
|------|--------|--------|--------------------|
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|      |        |        |                    |

## Home & Utilities

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

# Details of Professionals & Consultants



Maintain a comprehensive list of essential contacts for your family's financial and personal needs. Record the details of professionals such as your Chartered Accountant, Insurance Agent, Family Doctor, Mutual fund distributors and other key service providers. This ensures quick access to trusted experts whenever needed, providing peace of mind and efficient management of important matters.



## Family Doctor

|               |  |             |  |
|---------------|--|-------------|--|
| <b>Name</b>   |  | <b>City</b> |  |
| Address       |  |             |  |
| Phone No      |  | Pin Code    |  |
| Email Address |  | Note        |  |

## Chartered Accountant

|               |  |             |  |
|---------------|--|-------------|--|
| <b>Name</b>   |  | <b>City</b> |  |
| Address       |  |             |  |
| Phone No      |  | Pin Code    |  |
| Email Address |  | Note        |  |

## Lawyer

|               |  |             |  |
|---------------|--|-------------|--|
| <b>Name</b>   |  | <b>City</b> |  |
| Address       |  |             |  |
| Phone No      |  | Pin Code    |  |
| Email Address |  | Note        |  |



# MY FAMILY Record Book

## Life Insurance Agent

|               |  |             |  |
|---------------|--|-------------|--|
| <b>Name</b>   |  | <b>City</b> |  |
| Address       |  |             |  |
| Phone No      |  | Pin Code    |  |
| Email Address |  | Note        |  |

## Health Insurance Agent

|               |  |             |  |
|---------------|--|-------------|--|
| <b>Name</b>   |  | <b>City</b> |  |
| Address       |  |             |  |
| Phone No      |  | Pin Code    |  |
| Email Address |  | Note        |  |

## Vehicle Insurance Agent

|               |  |             |  |
|---------------|--|-------------|--|
| <b>Name</b>   |  | <b>City</b> |  |
| Address       |  |             |  |
| Phone No      |  | Pin Code    |  |
| Email Address |  | Note        |  |



# MY FAMILY Record Book

## Mutual Fund Distributor

|               |  |             |  |
|---------------|--|-------------|--|
| <b>Name</b>   |  | <b>City</b> |  |
| Address       |  |             |  |
| Phone No      |  | Pin Code    |  |
| Email Address |  | Note        |  |

## Tax Consultant

|               |  |             |  |
|---------------|--|-------------|--|
| <b>Name</b>   |  | <b>City</b> |  |
| Address       |  |             |  |
| Phone No      |  | Pin Code    |  |
| Email Address |  | Note        |  |

## Stock Broker

|               |  |             |  |
|---------------|--|-------------|--|
| <b>Name</b>   |  | <b>City</b> |  |
| Address       |  |             |  |
| Phone No      |  | Pin Code    |  |
| Email Address |  | Note        |  |



# MY FAMILY Record Book

## Other\_\_\_\_\_

|               |  |             |  |
|---------------|--|-------------|--|
| <b>Name</b>   |  | <b>City</b> |  |
| Address       |  |             |  |
| Phone No      |  | Pin Code    |  |
| Email Address |  | Note        |  |

## Other\_\_\_\_\_

|               |  |             |  |
|---------------|--|-------------|--|
| <b>Name</b>   |  | <b>City</b> |  |
| Address       |  |             |  |
| Phone No      |  | Pin Code    |  |
| Email Address |  | Note        |  |

## Other\_\_\_\_\_

|               |  |             |  |
|---------------|--|-------------|--|
| <b>Name</b>   |  | <b>City</b> |  |
| 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



Document all your investments and assets in this section. Include detail such as Stocks, Mutual Funds, Fixed deposits, life insurance policies and any other financial investment of asset. Keeping a comprehensive record ensures that your family has a clear understanding of your financial portfolio, making it easier to manage and access in the times of need.

## Bank Account Records

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

## 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 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 |                         |                         |                         |

## 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 |                    |                    |



# MY FAMILY Record Book

## 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 |                    |                    |



# MY FAMILY Record Book

## Mutual Fund Investment

| Investor Name | Scheme Name | Folio No | Lumpsum Inv | SIP Amount |
|---------------|-------------|----------|-------------|------------|
|               |             |          |             |            |
|               |             |          |             |            |
|               |             |          |             |            |
|               |             |          |             |            |
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|               |             |          |             |            |

## Mutual Fund Investment

|           |  |          |  |
|-----------|--|----------|--|
| Login URL |  |          |  |
| Login ID  |  | Password |  |
| Mobile    |  | Email    |  |





# MY FAMILY Record Book

## Mutual Fund Investment

| Investor Name | Scheme Name | Folio No | Lumpsum Inv | SIP Amount |
|---------------|-------------|----------|-------------|------------|
|               |             |          |             |            |
|               |             |          |             |            |
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|               |             |          |             |            |
|               |             |          |             |            |
|               |             |          |             |            |

## Stock Broking

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

| Sr No         | Acc -4 | Acc -5 | Acc 6 |
|---------------|--------|--------|-------|
| 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



Record all your tangible assets in this section, including real estate properties, gold, silver, and other valuable physical possessions. Keeping detailed information about these assets ensures that your family has a clear understanding of their worth and location, providing ease of management and peace of mind.

## Immovable Property

|                                    |  |                  |  |
|------------------------------------|--|------------------|--|
| <b>Address of Property</b>         |  |                  |  |
| Society's Share Certificate Number |  | Nominee(s)       |  |
| 1st Name of Owner                  |  |                  |  |
| 2nd Name of Owner                  |  |                  |  |
| Insurance Policy No                |  | Type of Property |  |
| Insurance Issuer                   |  | Mortgage Detail  |  |

|                                    |  |                  |  |
|------------------------------------|--|------------------|--|
| <b>Address of Property</b>         |  |                  |  |
| Society's Share Certificate Number |  | Nominee(s)       |  |
| 1st Name of Owner                  |  |                  |  |
| 2nd Name of Owner                  |  |                  |  |
| Insurance Policy No                |  | Type of Property |  |
| Insurance Issuer                   |  | Mortgage Detail  |  |

|                                    |  |                  |  |
|------------------------------------|--|------------------|--|
| <b>Address of Property</b>         |  |                  |  |
| Society's Share Certificate Number |  | Nominee(s)       |  |
| 1st Name of Owner                  |  |                  |  |
| 2nd Name of Owner                  |  |                  |  |
| Insurance Policy No                |  | Type of Property |  |
| Insurance Issuer                   |  | Mortgage Detail  |  |

## Immovable Property

|                                    |  |                  |  |
|------------------------------------|--|------------------|--|
| <b>Address of Property</b>         |  |                  |  |
| Society's Share Certificate Number |  | Nominee(s)       |  |
| 1st Name of Owner                  |  |                  |  |
| 2nd Name of Owner                  |  |                  |  |
| Insurance Policy No                |  | Type of Property |  |
| Insurance Issuer                   |  | Mortgage Detail  |  |

|                                    |  |                  |  |
|------------------------------------|--|------------------|--|
| <b>Address of Property</b>         |  |                  |  |
| Society's Share Certificate Number |  | Nominee(s)       |  |
| 1st Name of Owner                  |  |                  |  |
| 2nd Name of Owner                  |  |                  |  |
| Insurance Policy No                |  | Type of Property |  |
| Insurance Issuer                   |  | Mortgage Detail  |  |

|                                    |  |                  |  |
|------------------------------------|--|------------------|--|
| <b>Address of Property</b>         |  |                  |  |
| Society's Share Certificate Number |  | Nominee(s)       |  |
| 1st Name of Owner                  |  |                  |  |
| 2nd Name of Owner                  |  |                  |  |
| Insurance Policy No                |  | Type of Property |  |
| Insurance Issuer                   |  | Mortgage Detail  |  |

## Immovable Property

|                                    |  |                  |  |
|------------------------------------|--|------------------|--|
| <b>Address of Property</b>         |  |                  |  |
| Society's Share Certificate Number |  | Nominee(s)       |  |
| 1st Name of Owner                  |  |                  |  |
| 2nd Name of Owner                  |  |                  |  |
| Insurance Policy No                |  | Type of Property |  |
| Insurance Issuer                   |  | Mortgage Detail  |  |

|                                    |  |                  |  |
|------------------------------------|--|------------------|--|
| <b>Address of Property</b>         |  |                  |  |
| Society's Share Certificate Number |  | Nominee(s)       |  |
| 1st Name of Owner                  |  |                  |  |
| 2nd Name of Owner                  |  |                  |  |
| Insurance Policy No                |  | Type of Property |  |
| Insurance Issuer                   |  | Mortgage Detail  |  |

|                                    |  |                  |  |
|------------------------------------|--|------------------|--|
| <b>Address of Property</b>         |  |                  |  |
| Society's Share Certificate Number |  | Nominee(s)       |  |
| 1st Name of Owner                  |  |                  |  |
| 2nd Name of Owner                  |  |                  |  |
| Insurance Policy No                |  | Type of Property |  |
| Insurance Issuer                   |  | Mortgage Detail  |  |



# MY FAMILY Record Book

## Gold / Silver / Diamond / Platinum

| Name | Type (Gold /Silver / Silver article /Diamond / Platinum ) | Personal Use / Investment | Weight |
|------|---|---------------------------|--------|
|      |   |                           |        |
|      |   |                           |        |
|      |   |                           |        |
|      |   |                           |        |
|      |   |                           |        |
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|      |   |                           |        |
|      |   |                           |        |
|      |   |                           |        |
|      |   |                           |        |



## 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) |           |           |           |

| Detail                   | Vehicle 4 | Vehicle 5 | Vehicle 6 |
|--------------------------|-----------|-----------|-----------|
| 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) |           |           |           |

## Vehicle

| Detail                   | Vehicle 7 | Vehicle 8 | Vehicle 9 |
|--------------------------|-----------|-----------|-----------|
| 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) |           |           |           |

| Detail                   | Vehicle 10 | Vehicle 11 | Vehicle 12 |
|--------------------------|------------|------------|------------|
| 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



Keep track of all your financial obligations in this section. Record details of loans, mortgages, credit card debts, and other liabilities. This ensures your family is fully informed about your financial responsibilities, providing clear picture of your financial standing and aiding in efficient management.



# MY FAMILY Record Book

## 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 |
|--------|---------------------|-------------|-------------|-----|
|        |                     |             |             |     |
|        |                     |             |             |     |



# MY FAMILY Record Book

## Will:

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

## Notes:

|  |
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|  |
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# MY FAMILY Record Book

## Notes:



# MY FAMILY Record Book

## Notes:





# MY FAMILY Record Book

## Notes: