

What My Family Should Know						
Mobile / Phone (Self) : _____.						
READY REFERENCE:						
Sr. No.	Particulars	Name	Office address	Residence address	Mobile / Contact number	
A	Family Doctor					
B	Specialist Doctor (if any)					
C	Tax Consultant					
D	Insurance Agent					
E	Stock Broker					
DOCUMENTS DETAILS:						
Sr. No.	Particulars	Number	Expiry date			
A	Passport					
B	Driving license					
C	Credit Cards / ATM Cards					
D	Club Membership					
	Professional					
	Others					
E	Vehicle Details					
F	Income Tax PAN No.					
G	Aadhar Card					
LOCATION OF IMPORTANT DOCUMENTS						
Sr No.	Documents	Location	Nominee (if any)			
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					
Insurance - LIC Policy Details						
Sr. No.	Name/Nominee	Policy No./ Issuing Office	Agent Name and contact details	Issue Date/ Maturity Date	Premium Amount	Amt
Medi Claim Policy Details						
Sr. No.	Name & Type of Policy	Policy No. /Previous Policy No.	Agent Name and contact details	Issue Date /Maturity Date	Premium	Amt
1	Floater Policy					
2	Individual Policy					

Vehicle Insurance Policy Details						
Sr. No.	Name/Vehicle	Policy No. / Issuing Office	Agent Name and contact details	Issue Date /Maturity Date	Premium	Amt
1	Reg. No.			Valid till		
	Model Name & No.					
	Engine No.					
	Chassis No.					
	Mfg Yr.					
	CC -					
	Nominee-					
	Agent Name					
	& Mobile No.					
2						
3						
FIRE / BURGLARY INSURANCE DETAIL:						
Sr. No.	Name of the Property / Nominee	Policy No. / Issuing Office	Agent Name and contact details	Issue Date /Maturity Date	Risks covered Premium (Rs.)	Amt
1						
2						
BANK ACCOUNTS:						
Sr No	Bank Name - Branch	Type of Account	Operating Instructions	Nominee/s	Specimen Signature	Reg Mobile No
FIXED DEPOSIT / RECURRING DEPOSIT / COMPANY DEPOSIT:						
Sr No	Bank / Company Name & Branch	Type of Dep. (SDR /FDR /RD)	FDR No.	Date of Dep. And Due Date	Any loan against it	Amount (Rs.)
1						
	(Nominee/s)					
SHARES/UNITS/DEBENTURES/BONDS/MF: Standing in own name or Jointly with						
Sr No	Demat A/c / Broker Name	Demat A/c No.	Nominee	Demat Bank details	Held Singly / Jointly	Contact No of concerned Person
1						
LOCKERS						
Sr No	Bank Name & Branch	Locker No.	In the Name of	Code/Key No	Nominee	
PUBLIC PROVIDENT FUND (PPF)						
Sr No	Bank Name & Branch	Name of Account Holder	PPF A/c. No.	Maturity Date	Nominee /s	

Pension A/c

Sr No	Bank Name & Branch	Type of Account & Pension A/c. No.	Operating Instructions	Pension Payment Order No.	Nominee /s	Due Date for Live Certificate
1						

ATM / Debit Card Details

Sr. No.	Name	SB A/c. No. / Bank & Branch	ATM / Debit Card No.	Issue Date	Valid Thru
1					
2					

Credit Card Details

Sr. No.	Name	Bank's Name	ATM / Credit Card No.	Valid From	Valid Thru
1					

PAN CARD Details

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

Passport Details

Sr. No.	Name	Passport No.	Issue Dt.	Expiry Date

Electricity Details

Sr. No.	Billing Name	Address	Meter No.	Consumer No.	Deposit Rs.
1					
2					

Gas Pipe Line Details

Sr. No.	Billing Name	House Details	Meter No./ Route No	Consumer No/ Khata No.	Deposit Rs.
1					

Gas Cylinder Agency Service Details -

Sr. No.	Name	House Details	Consumer No.	IOC Serial No.	Deposit Rs.
1					

BSNL Land Line Details

Sr. No.	Name	House Details	Phone No.	Customer ID / Account No.	Deposit LL / Broad Band WIFI Rs.
1					

Driving License Details

Sr. No.	Name	Driving License No. / Licencing Authority	Issue Date /CDOI	Valid Details / Valid From	Valid Till
1					

Ration Card Details						
Sr. No.	Name	Ration Card No. /Issuing Authority	Issue Date	Remarks		
1						
Aadhar Card - UID Details						
Sr. No.	Name	Aadhar Card No. /Enrollment No.	Issue Date	Remarks		
1						
Election Identity Card - Details						
Sr. No.	Name	Father's /Husband's Name	Identity Card No.	Issue Date		
1						
HOUSE PROPERTY:						
Property Detail & standing in the name of:	How acquired (Inherited /Loan) Bank Loan Detail: Loan Amt. Inst. Amt. O/s. Amt.	Registration No. / Share Certificate No.	Nominee if any	Property Card No. and valid upto	House Tax (Rs.)	
(Mortgage with Bank Name & Branch / Place of Docs. And Risk/s covered)						
(Ins. Policy No., Amt. & Due Date)						
House Tax Details:						
Sr. No.	Name	House Details	Census No.	Property Identification No. (PIN)	Construction Sq. Mtrs.	
1						
INCOME TAX						
PAN	Ward No. and Office Address	Last Return Filed	File No.			

	WILL:				
	My will is executed on : _____				
	Copy of the will is kept at: _____				
	Legal Heirs/Successors				
	Name	Relation			
	POWER OF ATTORNEY :				
	Power of Attorney executed for Wife/Son/Others				
	My Power of Attorney is				
	Deed Executed on:				
	Details kept in File No.				
	MY DEBT / LIABILITIES :				
	(a) I am guarantor of				
	Give complete details:				
Sr No	Name	Amount	Gur. Againts		
1					
2					
	(b) I have borrowed from :				
	Give complete details				
Sr No	Name	Amount	Int	O/S Bal	Mortgage Details
1					
2					
	(c) Other Liabilities				