

Financial Records

Bank Accounts					
In whose name	Account T	ype Accol	unt number Na	ame of Bank	Location of records
Investment Accou					
In whose name	Account Type	Account number	Location of records	Phone Number	Name of Company



Financial Records

Insurance Policies					
In whose name	Туре	Policy number	Location of records	Phone Number	Name of Company
Employment benef					
In whose name	Type of benefit	Policy number	Location of records	Phone Number	Name of Company
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Personal Assets

List personal belongings such as furniture, clothing, entertainment and tech, jewelery, antiques and collectibles, vehicles, recreational vehicles, firearms etc. Taking photos or videos of your items is also a good idea. Include assets that are covered, but not stored in the home, like items in a storage unit. You may also want to list items not necessarily financially valuable but important to family members such as family photos, recordings and other mementos.

Description of item(s)		_
Estimated Value	Location	_
Receipts or appraisals Yes No		
If yes, location or how to access:		
Photos Yes No		
If yes, location or how to access:		
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Estimated Value	Location	_
Receipts or appraisals Yes No		
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Photos Yes No		
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