

IMPORTANT TO SPOUSES

This record is for the benefit and protection of your family. Facts herein recorded will probably change. Review - and perhaps revise - this form at least once a year.

LIFE INSURANCE

Do you have life insurance? _____

Company _____ Policy Number _____

Military, Fraternal or Company Insurance

Payable to whom? _____

Policies are kept _____

Any unpaid loans secured by policies? _____

From whom? _____

Is the life insurance in trust? _____

Trustee _____

Address _____

Insurance Advisor _____

Address _____

OTHER PERSONAL INSURANCE

Health and accident? _____

Company _____

Policy No. _____

Hospitalization? _____

Company _____

Policy No. _____

Medical and surgical expenses? _____

Company _____

Policy No. _____

Policies are kept _____

SOCIAL SECURITY

Social Security No. _____

Card is kept _____

Employment record is kept _____

Payment of retirement or survivors' benefits is not automatic. Claim should be filed immediately with nearest office of Social Security Board, which is located at _____

PENSION INFORMATION

Pension _____

No. _____ Survivor Benefit? _____

Contact _____

Address _____

FAMILY RECORDS

Born in _____

Date _____

Married in _____

Date _____

Where are birth certificates (or other proof of dates of birth) of members of family? Marriage certificate? Any naturalization papers? Discharge papers and other data as to military service? _____

BANK RECORDS

Where is your checking account? _____

Bank _____

Address _____

Account No. _____

Is it in your name alone or in joint names? _____

Where is your savings account? _____

Bank _____

Address _____

Account No. _____

Is it in your name alone or in joint names? _____

Bankbooks and cancelled checks are kept _____

U.S. SAVINGS BONDS

Do you have any of these bonds? _____

Where are they? _____

In whose name are they registered? _____

I have designated a co-owner or a beneficiary (Surviving co-owner may cash bonds without delay.) _____

OTHER MATTERS

Personal creditors or debtors, if any: _____

Copies of notes, loan agreements, receipts are kept _____

Income tax records, supporting data are kept _____

Tax Advisor _____

Address _____
