

Personal Inventory Work Sheet

Article & Description	Purchase Date	Purchase Price
Living Room		
Carpet/rugs		
Curtains/drapes		
Sofas		
Chairs		
Coffee tables		
End tables		
Tables		
Desk		
Wall hangings		
Clocks		
Lamps		
Television		
Radio/stereo		
Records/tapes		
Books		
Musical instruments		
Plants/planters		
Mirrors		
Accessories		
Other		

Article & Description	Purchase Date	Purchase Price
Dining Room		
Carpet/rugs		
Curtains/drapes		
Buffet		
Tables		
Chairs		
China cabinet		
China		
Silverware		
Glassware		
Clocks		
Lamps/fixtures		
Wall hangings		
Serving table/cart		
Other		
Bathroom		
Clothes hamper		
Curtains		
Dressing table		
Electrical appliances		
Scale		
Shower curtains		
Linens		
Cosmetics/toiletries		
Other		

Your Master List

Once you have gathered and organized the key records you need, the final step is making a master list. This list indicates at a glance where those important records are filed and that itemizes telephone or account numbers that you or someone acting on your behalf might need in an emergency.

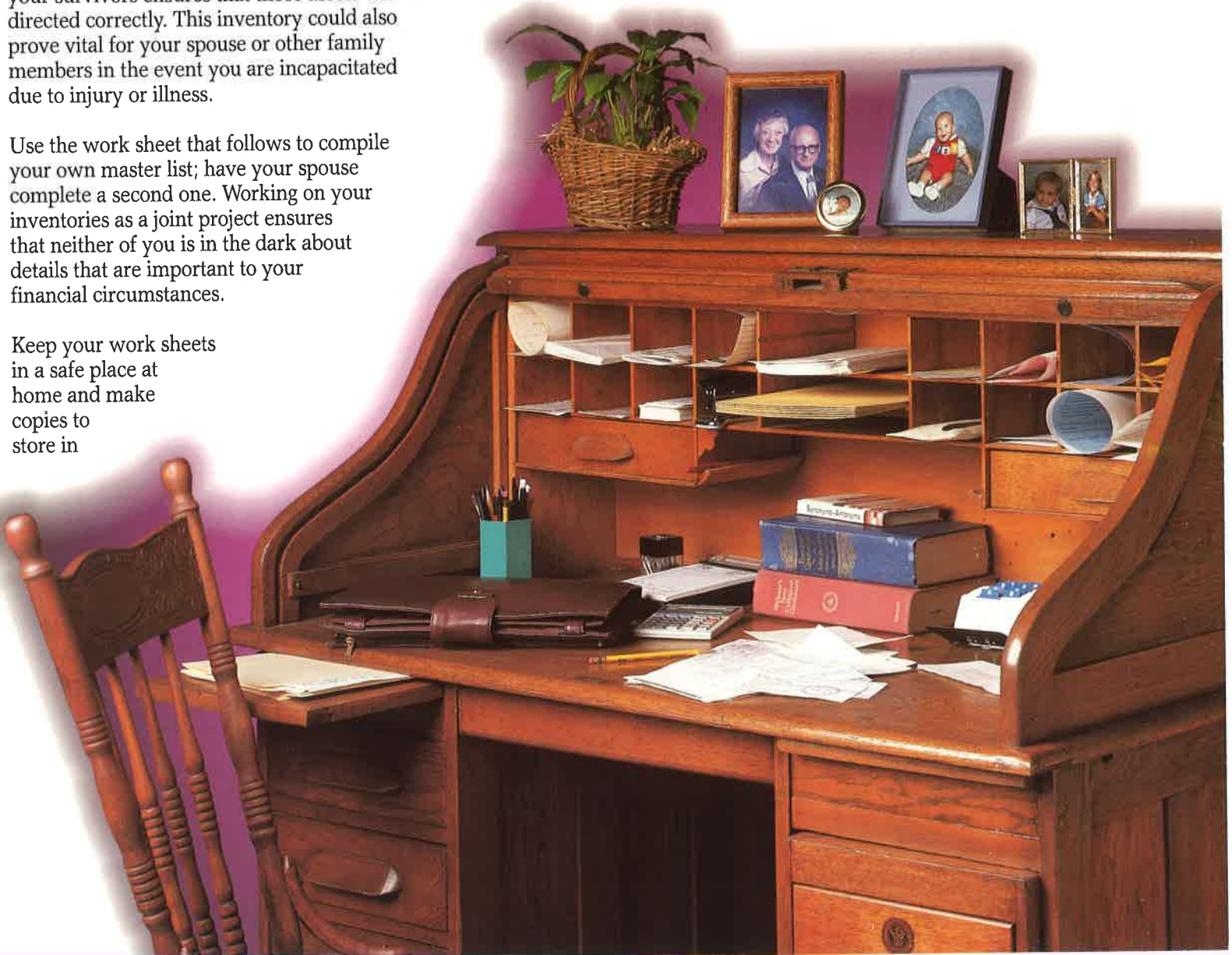
Millions of dollars worth of property and cash in bank accounts or other financial assets goes unclaimed each year because the person who owns the land or holds the account dies without leaving proper records that would alert his or her heirs that those assets exist. Making a financial road map for your survivors ensures that those assets will be directed correctly. This inventory could also prove vital for your spouse or other family members in the event you are incapacitated due to injury or illness.

Use the work sheet that follows to compile your own master list; have your spouse complete a second one. Working on your inventories as a joint project ensures that neither of you is in the dark about details that are important to your financial circumstances.

Keep your work sheets in a safe place at home and make copies to store in

your safe-deposit box. Make sure other family members know where to find these valuable guides to your financial life. Finally, review and update your work sheets once a year.

The initial set-up of this filing system will take an investment of a few hours, but it is an investment that will pay for itself by the time saved in the future. Once set up, you should find the system easy to maintain, especially when you start realizing the money-saving benefits. Most importantly, you and your family will reap the multiple rewards of having an accessible personal record at times of need. There aren't many other things that can do so much and cost so little!



The Master List

1. Personal Information & Documents

Family member	Birth Date	Social Security #

Document	Location
Birth certificate	
Marriage license	
Passport	
Military discharge papers	
Vaccination records	
Divorce decree	
Power of Attorney	
Other	

2. Safe-Deposit Boxes

Depository address	Owner	Person With Power of Attorney	Contents
Box #1			
Box #2			

3. Bank Accounts

Bank Name/Address	Type of Account	Account #	Location of Bank Records

4. Investments

Type (stock, bond, mutual fund, CDs, etc.)	Account #	Number of Shares Or Units	Location of Account Statements

For both bank savings accounts and other investments, also note if account is for a special purpose, such as an IRA, KEOGH or other tax-favored savings. Note also when CDs or bonds are set to mature, and when you update your list annually, mark any upcoming maturity dates on your calendar.

5. Employee Savings, Retirement or Stock Plans

Employer	Type of Plan	Value	Date of Valuation	Beneficiary

6. Real Estate Records

Property Address & Description	Location of Deed	Location of Property Tax Receipts	Name/Address of Mortgage Lender

If mortgage has been paid in full, note date and location of pertinent documents.

7. Children's Accounts And Trusts

Child's Name	Type of Account or Trust	Where Funds are Invested	Name/Address of Custodian or Trustee	Value

Note the date the valuation you list was calculated.

8. Life Insurance

Insurance Co.	Policy #	Face Value	Beneficiaries	Location of Policy

Be sure to include information on any employer-provided coverage.

9. Health Insurance

Insurance Co.	Policy #	Type of Coverage	Location of Policy

10. Casualty Insurance (Homeowner's or renter's, auto, etc.)

Insurance Co.	Policy #	Type of Coverage	Policy Limits	Agent and Phone #

11. Income Tax Records

Return and Documents	Location
Current Year	
Last Year	
Prior Years	



12. Credit Cards And Loans

Type of Card or Loan	Issuer or Lender	Account #	Location of Statements

If you have borrowed from or are owed money by friends or relatives, be sure to have such arrangements outlined in writing and note location of such documentation here. Also, for your own convenience, next to each credit card, list the telephone number to call if the card is lost or stolen.



13. Will

Lawyer Name Address and Phone #	Executor Name Address and Phone #	Location of Will



14. Burial Plot

Cemetery	Location of Deed and Burial Instructions



15. Advisers

	Name	Address	Phone #
Lawyer			
Stockbroker			
Tax Preparer			
Life Insurance Agent			
Financial Planner			
Other			

16. Explanatory remarks

Attach an additional page here outlining any instructions that might be helpful to someone taking over your affairs temporarily or upon your death. For example, you might explain the Social Security or veteran's benefits that are available to your survivors.