



UNIVERSITY OF IDAHO
College of Agriculture

Family Financial Checklist

AND

Important Papers

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**IDAHO Agricultural
Extension Service**

**Bulletin No. 368
April 1962**

FAMILY FINANCIAL CHECKLIST OF IMPORTANT PAPERS

FOR _____ Date Recorded or Revised _____

Copy No. 1 of this list stored at _____ Copy No. 2 stored at _____

Safe deposit box No. _____ At _____ Key kept at _____

Social Security No. _____ Where card is kept _____

Our Advisers

Insurance agent	
Lawyer	
Banker	
Clergyman	
Other	

Our Insurance

Type	Company	Policy No.	Beneficiary	Amount	Loans against and whom	Methods of Settlement	Where Kept
Hospital and Medical							
Car							
Fire-theft							
Liability							

Our Bank Accounts and Savings

Type	Name of Bank	Address or location	In whose Name	Account No.	Bankbook kept where
Checking					
Savings					

Our U.S. Savings Bonds

Serial Number	Date Purchased	Purchase Price	Maturity Date	Owner Co-owner	Beneficiary	Where Kept

Our Stocks and Bonds

Kind (Common, Preferred, etc.)	Company	Serial No.	Date Purchased	Purchase Price	Cost per Share	Where Kept

Other Investments

Kind	Company	Serial No.	Date Purchased	Purchase Price	Cost per Share	Where Kept

Our Real Estate

Type	Location and/or Description	Purchase Dates	Purchase Price	Mortgage and Holder	Where Record is Kept

Our Automobile(s)

Make	Model and Year	Engine No. or Serial No.	Purchase Price	In Whose Name	Loan	Where Paper is Kept

What We Owe

Item or description	Company or person owed and address	Amount	Purchase Date	Payment-Plan M-SA-A*	Final Payment Due	Where Records Kept

What Others Owe Us

Item or description	Company or person owed and address	Amount	Purchase Date	Payment Plan M-SA-A*	Final Payment Due	Where Records Kept

*Monthly, semi-annual, annual

Other Important Items and Records

Kind or type	Have	Need	Where Kept	Kind or type	Have	Need	Where Kept
Will				Cancelled checks			
Birth, Death Cert.				Receipts			
Marriage Cert.				Guarantees			
Military Records				Household inventory			
Social S. Card				Car Title			
Deeds				Bill of Sale			
Mortgage				Easements —			
Stocks and Bonds				Rights of Way			
Life Ins. Policy				Patents, Copyrights			
Health Ins. Policy				Adoption Papers			
Fire Ins. Policy				Citizenship Papers			
Income Tax Records				Divorce Papers			
Annual Income and Expense Records				Passport Papers			
Farm Production Records				Educational Records			
Jewelry				Employment Records			
Keys to:				Rental Property Records			
				Burial Plot			
				Other			

Regardless of his income everyone has a problem of managing money. The shrinking value of the dollar earned and the dollar saved poses new difficulties for meeting the costs of daily living **plus** providing a small savings fund for emergencies and special opportunities.

Families need good records of their important personal affairs. They often need these records in a hurry. To avoid confusion, delay, and loss of money, papers should be systematically listed, filed, and stored where they are readily available.

More than ever, receipts, documents, proofs of ownership, and pieces of identification are essential to financial affairs. They may be necessary in the collection of pensions and retirement, military compensation, or other funds. They may be necessary to solve tax or inheritance problems.

DO YOU KNOW exactly where all your possessions are located? Does anyone else know? Would someone know in case of your death? If you always intended to collect certain papers and get things together, NOW is the TIME!

This check list is a reminder to jog your memory and thinking. Get your family together and review your business papers. Some may need revising. On these pages list important items and keep the information up to date. We have printed it on vivid paper so it is not easily lost, a heavy paper that will last many years. Keep one or two copies as needed or desired in a safe, accessible, and reliable place. It's good business!

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