What my family should know

A private record of your family's accounts, policies, documents and trusted contacts, so the people you love can find everything when it matters most.

Prepared by _____

Date _____

How to use this organizer

1. Fill it in by hand and review it once a year, for example when you renew your insurance.
2. Keep it somewhere safe, and tell one or two people you trust where it is.
3. **Never write passwords, PINs, CVV numbers or OTPs here.** Note instead where they can be found, such as a password manager or a sealed envelope with your lawyer.

About me

Name _____

Mobile / phone _____

Ready reference

	Name	Office address	Residence address	Mobile / contact
Mutual fund distributor	Equimaxx LLP (ARN-365413)	Unit 204, Shilpin Centre, Wadala West, Mumbai 400031		Himesh Mehta +91 98218 42054 info@equimaxx.in
Family doctor				
Specialist doctor (if any)				
Chartered accountant / tax consultant				
Insurance agent				
Stock broker				
Lawyer				

Document details

Document	Number	Expiry date	Original kept at
Passport			
Driving licence			
PAN			
Aadhaar			
Vehicle registration			
Club / professional memberships			
Other			

Location of important documents

Document	Where it is kept
My will	
Spouse's will	
Insurance policies	
Investment papers	
Property records	
Birth certificates	
Marriage certificate	
Domicile certificate	
Important agreements	
Other important papers	

Life insurance policy details

Insured / nominee	Policy no. / insurer	Sum assured	Issue / maturity date	Plan & term	Premium	Remarks

Health insurance policy details

Sr.	Name & type of policy	Policy no. / previous policy no.	Sum insured	Renewal date	Premium	Remarks
1						
2						
3						

Vehicle insurance details

Sr.	Vehicle (reg. no., model)	Policy no. / insurer	Insured value	Valid till	Premium	Remarks
1						
2						
3						

Fire / burglary insurance details

Sr.	Property / nominee	Policy no. / insurer	Sum insured	Risks covered	Valid till	Premium	Remarks
1							
2							

Bank accounts

Bank	Branch	Account type	Operating instructions	Nominee(s)	Customer care no.

Fixed, recurring & company deposits

Bank / company & branch	Type (FD / RD)	Deposit no.	Date	Amount (₹)	Maturity date	Holder(s)	Nominee(s)	Loan / OD availed

Mutual fund investments

Fund house (AMC)	Folio no.	Holder(s)	Nominee(s)	Registered mobile / email	SIP running?

Your mutual fund distributor can give you a consolidated account statement (CAS) listing every folio held in your PAN.

Shares, bonds & debentures

Company / security	Quantity	Demat a/c no.	Depository participant / broker	Statement kept at	Held singly / jointly

Lockers

Bank & branch	Locker no.	In the name of	Key kept at	Annual rent (₹)	Rent due	Nominee	Contents

Public Provident Fund (PPF)

Bank / post office & branch	Account holder	PPF a/c no.	Maturity date	Nominee(s)

Pension accounts

Bank & branch	Pension a/c no.	Pension payment order no.	Nominee(s)	Life certificate due

Debit cards

Sr.	Card holder	Bank & account	Card no. (last 4 digits)	Valid thru	Lost-card helpline
1					
2					
3					
4					

Credit cards

Sr.	Card holder	Bank	Card no. (last 4 digits)	Valid thru	Lost-card helpline
1					
2					
3					
4					

PAN details

Sr.	Name	Father's / spouse's name	PAN	Contact
1				
2				
3				
4				

Passport details

Sr.	Name	Passport no.	Issue date	Expiry date	Issued at
1					
2					
3					
4					

Driving licence details

Sr.	Name	Licence no. / RTO	Issue date	Valid till	Blood group
1					
2					
3					
4					

Aadhaar details

Sr.	Name	Aadhaar no. / enrolment no.	Mobile linked	Remarks
1				
2				
3				
4				

Voter ID details

Sr.	Name	Father's / spouse's name	EPIC no.	Issue date
1				
2				
3				
4				

Ration card details

Sr.	Name	Card no. / issuing authority	Issue date	Remarks
1				
2				
3				

Electricity

Sr.	Consumer name	Address	Meter no.	Consumer no.	Deposit (₹)	Remarks
1						
2						

Piped gas

Sr.	Consumer name	Address	Meter / BP no.	Customer no.	Deposit (₹)	Remarks
1						
2						

Gas cylinder agency

Sr.	Consumer name	Agency	Consumer no.	Deposit (₹)	Remarks
1					

Landline & broadband

Sr.	Account name	Provider	Phone / account no.	Deposit (₹)	Remarks
1					
2					

House property

Property & owner(s)	How acquired / loan details	Registration / share certificate no.	Nominee	Property card no.	Insurance policy	Documents kept at

Property tax

Sr.	Owner	Property address	Property ID	Area (sq. m)	Remarks
1					
2					
3					

Income tax

PAN	Assessing officer / ward	Last return filed (AY)	Filed by (CA)

My will

Executed on _____

Copy kept at _____

Executor (name, phone, email) _____

Witness 1 _____

Witness 2 _____

Registered with _____

Private family trust

Sr.	Name of trust	Objective	PAN	Trustee(s) & contact	Original deed kept at
1					
2					
3					

Hindu Undivided Family (HUF)

Sr.	Name of HUF	Objective	PAN	Karta & coparceners	Original deed kept at
1					
2					
3					

Power of attorney

Executed in favour of _____

Deed executed on _____

Details kept in file no. _____

Debts & liabilities

I am a guarantor for _____

I have borrowed from _____

Other liabilities _____

Keep this document safe.

Review it once a year and whenever something changes: a new policy, a new account, a change of nominee. Tell one or two people you trust where it is kept.

If you would like help organising your family's investments and nominations, we are a phone call away.

Equimaxx LLP

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