# **GETTING YOUR HOUSEHOLD IN ORDER**Family Preparedness Household Notebook

How to Prepare Comprehensive Records and Personal/Family Information for Emergency/Disaster Survival

- Easily
- Quickly
- Inexpensively

#### **James Talmage Stevens**

Author of

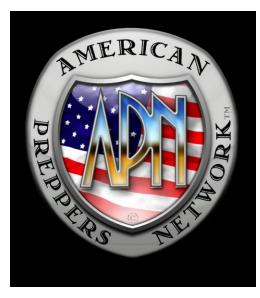
Making the Best of Basics — Family Preparedness Handbook (11th Edition)
And

Don't Get Caught With Your Pantry Down!

How to Find Preparedness Resources for the Unexpected and Expected

**Price \$16.95** 

## In Cooperation with



## **GETTING YOUR HOUSEHOLD IN ORDER**

## **Family Preparedness Household Notebook**

#### **Table of Contents**

Chapter / Subject	Page
The Family Preparedness Household Notebook	2
Suggestions for Getting Organized	3
Chart 1 – Records Retention & Storage Chart	3
Worksheets for Organizing Information	6
Chart 2 – Directory of Family Preparedness Household Notebook Worksheets	6
Category 1. Emergency Information	7
Worksheet 1 – Important Emergency Telephone Numbers	7
Category 2. Family Information	8
Worksheet 2A – Family Members	8
Worksheet 2B – Individual Family Member Records	9
Worksheet 2C – Location of Family Documents	10
Category 3. Personal Insurance	13
Worksheet 3A – Life Insurance	13
Worksheet 3B – Health and Hospitalization Insurance	14
Worksheet 3C – Accident and Disability Insurance	15
Category 4. Financial Records	16
Worksheet 4A – Banking Accounts	16
Worksheet 4B – Financial Advisors	16
Worksheet 4C – Contents of Safe Deposit Box	17
Worksheet 4D – Record of Credit and Debit Cards	18
Worksheet 4E – Record of Debts	18
Worksheet 4F – Record of Money Owed Us	19
Worksheet 4G – Record of Personal Property Loaned To Others	19
Worksheet 4H – Equities in Stocks, Mutual Funds, Treasuries, and Corporate Bonds	20
Worksheet 4I – Precious Metals and Other Investments	21
Category 5. Real Estate & Property	22
Worksheet 5A – Real Estate and Property Insurance	22
Worksheet 5B – Property and Household Inventory	23
Worksheet 5C – Photos / Videos of Property and Household Items	25
Worksheet 5D – Real Estate and Property Descriptions	25
Worksheet 5E – Real Estate Financials	26
Worksheet 5F – Record of Major Home Improvements	27
Category 6. Business Information	28
Worksheet 6A – Business Interests	28
Worksheet 6B – Business Property Insurance	29
Category 7. Guidelines for Survivors	30
Worksheet 7 – Final Disposition Information and Guidelines	30

© 2009 James Talmage Stevens, **Making the Best of Basics**; and <u>www.FamilyPreparednessGuide.com</u> blogsite. All Rights Reserved. This content may be forwarded without specific permission in full, with copyright notice, contact information, links, and creation information intact when intended for non-profit use only. For any other use, permission in writing from the author is required. Questions regarding permission should be addressed to: <u>www.familypreparednessguide.com/editor</u>.



## GETTING YOUR HOUSEHOLD IN ORDER

## Family Preparedness Household Notebook

qually important to having water, food, clothing, and some money stored for present and future use is the need to have a copy of the family's financial matters documented and located in one place for instant access. These are vital records for your post-disaster recovery. Take the time *now* to organize your family's papers and records—it may well be the second best investment you can make in your family's total preparedness activities.

The ability to prove ownership of your bank account(s), safety deposit box, business, brokerage, and investment accounts may be necessary after a natural disaster or other calamity destroys the bank, credit union, brokerage or other financial records. Also, since having proof of ownership allow you to maintain your real property rights, provide qualification for your earned benefits, or provide continuing rights to the use of physical property, it is well worth the effort it takes to amass the information and organize it so it's readily available.

It is most important that all members of the family know where the family's personal records, documentation of ownership, and other financial papers and records are kept. They must also know to whom to turn for advice in case the primary responsible individual becomes incapable of directing family activities. Planning ahead by having these forms and papers readily available can save a great deal of agony, anguish, time, and money—especially when an emergency or other unpleasantness causes debility, disablement, or death in the family.

Keep the originals of all your important forms in a safe deposit box at the bank or in another secure, private, accessible, safe place away from your home. The following pages detail how you can establish a system for safeguarding your family's personal and financial information. This information may be invaluable to prove your ownership, provide access to earned benefits—and maybe even protect your life! This is an exercise of prudence, practicality, and providence!

Notes

"What can I actually do?

We can, each of us, work to put our own house in order."

**Small is Beautiful,** by E. F. Schumacher

**Notes** 

#### THE FAMILY PREPAREDNESS HOUSEHOLD NOTEBOOK

Make up a **Household Preparedness Notebook** using the worksheets provided in this chapter to collect and maintain your family's critical information in a single volume. This **Notebook** provides a designated place to keep *copies* of important and updated records and is available on short notice to be carried *with* the family in the event of an emergency. Make certain each responsible family member knows where it is kept, and that it is a most important item to retrieve on a moment's notice, when circumstances require.

Prepare a safe place to keep this **Notebook** with its documents and papers. This **Notebook** will help you keep all your updated records in one place. Use top-loading plastic sheet protectors for the documents, with index dividers to identify the categories. Insert sheets of data and documents in a large, well-organized, loose-leaf notebook, so extra pages can be added as needed. Revise all information as needed to keep your data current.

Supplies for the **Household Preparedness Notebook** are available at office supply and discount stores. The cost for a notebook and supplies should not exceed \$10 to \$20, depending on the amount and quality of materials selected, and should include the following items and accessories:

- Loose-leaf notebook
- Top-loading sheet protectors
- Index dividers
- Waterproof, portable container

Use the forms provided in this chapter to collect and maintain family vital statistics, ancestor history (genealogy), and financial records. Examples of important documents that you will want to *copy* for your **Household Preparedness Notebook** include the following:

☐ Family documents—birth, adoption, marriage, and death certificates ☐ Relatives to contact (local and out of area) □ Social Security cards and entitlements Passports ☐ Medical records (especially prescription medications and eyeglasses) ☐ Immunization records □ Driver's license Military records ■ Academic certificates Tax returns (minimum 3 years) □ Wills (updated!) Personal insurance policies □ Retirement accounts ☐ Contents of safe deposit box ☐ Property and household items inventory (photographs and videotapes) Banking and money accounts (3 years) ☐ Record of credit / debit cards (3 years) ☐ Titles to equipment and property Property insurance policies □ Contracts □ Deeds to properties and equipment ☐ Stocks, bonds, certificates, and other financial instruments ☐ Additional documents relative to your personal needs ☐ Stash of cash—bills in small denominations and silver coins

information suggested in these charts is more than an exercise of prudence and practicality; it might very well prove to be providential!

The gathering of

Should you have an emergency need for any of these documents in the future, they'll be easily found and immediately available to help resolve problems and give you peace of mind. This is a vital part of being prepared. It requires discipline and attention to detail. *This record is the summation of your life's work, so do this task with a view of protecting your estate for the future.* 

Additionally, keep a small amount of money in small bills and quarters, dimes, and nickels inside a pocket of this **Notebook**—at least enough to make a few telephone calls or perhaps "*influence*" someone to do what they would have done under *normal* conditions.

#### SUGGESTIONS FOR GETTING ORGANIZED

Resolve to get organized now—get started and just do it! It's really much easier than searching for lost records in mountainous piles of old bills, tax forms, receipts, and hand-me-down recipes when you're under pressure of time and need!

The following ideas and suggestions are intended to help you accomplish the task ahead.

- □ Keep only *copies* in your home notebook. Always protect originals in a safe environment. Moisture, temperature, and exposure to light causes deterioration of paper, cloth, and wood items.
- Rent and use a safe-deposit box in a bank, credit union, savings and loan, or privately operated business. Place in the safe deposit box the originals of important individual and family documents, inventory lists, and photos/videos of property and possessions. Use the box to store copies of wills and trusts, partnership agreements, and other legal documents. Store valuables, including certificates for stocks and bonds, infrequently used jewelry, and a list (photos are better, videotapes are best!) of expensive and rare jewelry, antique furniture, silver dinner sets, or works of art, also.
- □ Waterproof *all* documents and other items subject to water damage. Sprinklers can go off accidentally, and floodwaters can rise—even in a vault!
- ☐ Fireproof your vital information. You can find used fireproof safes at most places where safes are sold or repaired. Used safes may cost as little as 10% of new units—and are just as safe!
- Review and discard outdated documents periodically. How long should you keep those voluminous records? In the table following are guidelines to help you determine periods of recommended storage for various forms and documents:

## Chart 1 Records Retention & Storage Chart<sup>1</sup>

Period of time to retain	Item or description
Discard upon expiration or disposal of asset	□ loan agreements □ notes due you or owed □ bank account passbooks □ lease agreements □ auto registration
Short term (1 - 3 years)	☐ household bills ☐ expired insurance policies
Medium term (4 - 7 years)	<ul> <li>□ tax returns and supporting data</li> <li>□ bank statements and account information</li> <li>□ canceled checks / check registers (except for major purchases)</li> <li>□ cash receipts journals</li> <li>□ paid loan documents</li> </ul>
Long term (permanently)	marriage license adoption papers divorce documents checks and receipts for major purchases brokerage statements home purchase documents home improvements receipts business (self-employment) records income property documents wills and trusts gift tax returns inheritance documents

<sup>&</sup>lt;sup>1</sup> Federal, state, and local jurisdiction tax laws change often! This information is for reference only. Seek the advice of a qualified tax professional in your local area for current requirements.

#### Notes

## Preparedness Pointers

- Chance favors the prepared mind.
- Reality rewards the truly prepared.
- Hope for the best, prepare for the worst, and deal with what comes.

#### ◆ Response to Emergencies/Situations Created by Unforeseen Events

**Notes** 

Create an in-home business/records center for your preparedness endeavors. In addition to organizing your household information and records, you will find that the effort of planning, budgeting, searching, shopping, and aggregating a year's supply of foods and other items will itself be a sizeable in-home business-like venture.

The difference between having your financial records neat and well maintained on the one hand or what we call a people-caused (or perhaps a personal) disaster on the other is usually a matter of simple organization. No genius is required—just a moderate amount of meaningful work. The benefit is that you'll spend less time looking for a canceled check, having anxiety attacks over misplaced receipts or perhaps an important stock certificate, or days gathering information for your annual tax return.

The real work is in the creation of the system. Once you've created the system, you'll save many hours in the day-to-day management of your business and financial matters. So, you can create a system, buy a system from a business supply store, get computer software, or combine some of these suggestions. Here are some basic organizing tips utilized as we have tried to gain better control of the paperwork flow in our own lives.

If you haven't established an in-home business center, get a small desk, some office supplies and at least a 2-drawer file cabinet for your preparedness "business." Keep in this desk the materials that you use almost daily:

- Stationery
- Bills to be paid
- Documents to be filed
- A record of cash receipts and cash disbursements
- Office supplies—pencils, note paper, file folders, paper clips, stapler, staples, etc.

Use the file cabinet to store materials and documents you use less frequently. Use folder systems with tabs in both the desk and the file cabinet. It makes filing and finding records easier. Set up folders with categories for the types of items you need for reference and follow-up with an *alphabetical file* and a *1-31 date* file for your important events.

Typical folders to keep in your desk:

	Bills to pay
	Cash receipts journal
	Income from investments
	Stock transactions
	Documents to be filed
	Income documents
	Gifts received
	Tax planning and financial planning information
	Records of children's financial matters-1 for each child in separate folders
Typical	folders to keep in your file cabinet:
	Household bills paid (by year)
	Personal financial statements
	Home and home improvement records
	Tax returns (by year)
	Canceled checks and bank statements (by year)
	Investment account statements
	• IRA / Keogh / Roth IRA plans
	• 401(k) plan documents
	Bank passbooks and certificates
	Copies of wills or trusts
	Employment contract
	Partnership/business investments
	Record of company benefits
	Investment prospectuses and quarterly reports

Notes

☐ Insurance policies:

- Life
- Health
- Disability
- Auto
- Homeowner's or renter's coverage (including umbrella policy for business)
- ☐ Have a cash disbursements journal—you probably already have one as your checkbook is a record of what you've disbursed (paid) for goods and services. Your disbursements journal can be as sophisticated, complicated, or as simple as you like. There are a number of computerized programs for recording and organizing financial data, and it is well worth the price to have one and use it to analyze your financial position on a timely basis.
- Also, keep a record of cash receipts, or at least a cash receipts journal. Why would you want to keep a record of receipts? A record allows you to look back at any time and determine who paid you how much, what, and when. At the end of the year, you can use the journal to double-check, for example, that you received all your dividend checks from a particular mutual fund, or all interest payments on a certificate of deposit. You could also, if you wanted, add a series of columns for the types of receipts you anticipate during the year: dividends, interest, rent, bonuses, etc. to help with your budget, as well as your cash flow.

To be aware of what income you receive, record these minimum details:

- Date income received
- Payor or from whom received
- Amount received
- Amount deposited
- Deposit date

As part of your family's preparedness efforts, take the time **NOW** to organize your family's records. Recognize the importance of being able to access your information while the federal, state, and local governments, financial, legal, and educational systems are functioning normally to assist you in your documentation. For those who have accomplished some of this, be grateful it is done—but stay in pursuit until you're satisfied you're free of the threat of lost information. For those who haven't begun, start gathering this data now, because it will require maximum persistence and dedication as the demand for this type of information increases. Also, agencies will have limited time and personnel to handle both the system failures and the request for information overload. Though all this may seem overwhelming at times, keep in mind: *there is perfect order in the chaos of uncertainty!* 

Notes

#### WORKSHEETS FOR ORGANIZING INFORMATION

The following chart identifies the worksheets available for use in organizing your entire family's information, if you have not done so already. These worksheets will guide you in accounting for your individual and family information, as well as the family's financial assets and liabilities. They are grouped to help you organize your collection of valuable documents and facilitate their safeguarding. Please take time to review these worksheets, and then begin to enter the requested information in an orderly manner.

**Chart 2 Directory of Family Preparedness Household Notebook Worksheets** 

Worksheet	Worksheet Description	Page #
	Category 1. Emergency Information	
1	Important Emergency Telephone Numbers	7
	Category 2. Family Information	
2A	Family Members	8
2B	Individual Family Member Records	9
2C	Location of Family Documents	10
	Category 3. Personal Insurance	
3A	Life Insurance	13
3B	Health and Hospitalization Insurance	14
3C	Accident and Disability Insurance	15
	Category 4. Financial Records	
4A	Banking Accounts	16
4B	Financial Advisors	16
4C	Contents of Safe Deposit Box	17
4D	Record of Credit and Debit Cards	18
4E	Record of Debts	18
4F	Record of Money Owed Us	19
4G	Record of Personal Property Loaned To Others	19
4H	Equities in Stocks, Mutual Funds, Treasuries, and Corporate Bonds	20
41	Precious Metals and Other Investments	21
	Category 5. Real Estate & Property	
5A	Real Estate and Property Insurance	22
5B	Property and Household Inventory	23
5C	Photos / Videos of Property and Household Items	25
5D	Real Estate and Property Descriptions	25
5E	Real Estate Financials	26
5F	Record of Major Home Improvements	27
	Category 6. Business Information	
6A	Business Interests	28
6B	Business Property Insurance	29
	Category 7. Guidelines for Survivors	
7	Final Disposition Information and Guidelines	30

otes/Reminders:	 	 	 

#### **CATEGORY 1. EMERGENCY INFORMATION**

## Worksheet 1 Important Emergency Telephone Numbers



# **Emergency Telephone Numbers**

_					
What	?	Who? Person / Resource	Where?	How? Call this Number	When? As Directed
Nearest R			Local Address		
Local Cor (other than			Local Address		
Out of	Day	Name	Address	( )	
Area Contact	Night	Name	Address	( )	
Fire			Local		

Emergency		O	911 <i>r</i> 1-911	
Ambulance or Paramedics	Ambulance	Local		
Police / Sheriff		Local		
Hospital	Name	Local		
<b>Family Doctor</b>	Name	Address		
Pharmacy	Name	Address		
<b>Poison Control</b>	Local	Regional		
Red Cross	Name	Address		
	Utiliti	es / Providers		
Electric Power	Name	Address		
Gas	Name	Address		
Water/Sanitation	Name	Address		
Telephone	Name	Address		
Insurance Agent	Name	Local		

Local

Name

**Babysitter** 

### **CATEGORY 2. FAMILY INFORMATION**

#### Worksheet 2-A **Family Members**

Name of Family Member	Date of Birth	Place of Birth & Where Recorded	Social Security #

Notes

#### Worksheet 2-B Individual Family Member Records

Record of Document  Birth Certificate  Adoption Records  Records  Citizenship Records  Social Security Card  Card  Passport  & Wass  Driver's License  Retirement Accounts  Accounts  Academics  Awards Prizes  Health Records  Inmunication Record  Disability Awards  Will  Other  Include I		Location of Records					
Adoption Records  Marriage License  Citizenship Records  Social Security Card  Passport & Visas  Driver's License  Military Records  Retirement Accounts  Settlements  Academics  Awards / Prizes  Health Records  Immunization Record  Disability Awards  Medications  Eyeglasses  Church Records  Mare Accounts  Citizenship Records  Awards / Prizes  Medications  Eyeglasses  Church Records  Marriage License  Citizenship  Awards  Award	Record or Document	Father	Mother	Child	Child	Child	Child
Records Marriage License Citizenship Records Social Security Card Passport & Visas Driver's License Military Records Retirement Accounts Settlements Academics Awards / Prizes Health Records Immunization Record Disability Awards Medications Eyeglasses Church Records Will	Birth Certificate						
Citizenship Records       Colia Security Card       Colia Security Card<	Adoption Records						
Records Social Security Card Passport & Visas Driver's License Military Records Retirement Accounts Settlements Academics Awards / Prizes Health Records Immunization Record Disability Awards Medications Eyeglasses Church Records Will	Marriage License						
Card Passport & Visas Driver's License Military Records Retirement Accounts Settlements Academics Awards / Prizes Health Records Immunization Record Disability Awards Medications Eyeglasses Church Records Will	Citizenship Records						
& Visas Driver's License  Military Records Retirement Accounts Settlements Academics Awards / Prizes Health Records Immunization Record Disability Awards Medications Eyeglasses Church Records Will  Military Records  Military Records  Military Records  Medications  Settlements  Academics Academic	Social Security Card						
Military Records Retirement Accounts Settlements Academics Awards / Prizes Health Records Immunization Record Record Disability Awards Medications Eyeglasses Church Records Will	Passport & Visas						
Retirement Accounts  Settlements  Academics  Awards / Prizes  Health Records  Immunization Record  Disability Awards  Medications  Eyeglasses  Church Records  Will	Driver's License						
Accounts Settlements Academics Awards / Prizes Health Records Immunization Record Disability Awards Medications Eyeglasses Church Records Will	Military Records						
Academics  Awards / Prizes  Health Records  Immunization Record  Disability Awards  Medications  Eyeglasses  Church Records  Will							
Awards / Prizes Health Records Immunization Record Disability Awards Medications Eyeglasses Church Records Will	Settlements						
Health Records Immunization Record Disability Awards Medications Eyeglasses Church Records Will	Academics						
Immunization Record  Disability Awards  Medications  Eyeglasses  Church Records  Will	Awards / Prizes						
Record  Disability Awards  Medications  Eyeglasses  Church Records  Will	Health Records						
Awards Medications Eyeglasses Church Records Will							
Eyeglasses Church Records Will	Disability Awards						
Church Records Will	Medications						
Will	Eyeglasses						
	Church Records						
Other	Will						
	Other						

## Worksheet 2-C **Location of Family Documents**

Record or Document	Location / Details
Abstract of title for home or properties	
Automobile / title / bill of sale	
Automobile registration	
Other vehicle titles & registrations	
Birth certificates & adoption records	
Canceled checks / bank state- ments	
Church records:	
Cemetery plot / deed	
Citizenship papers	
Contracts	
Death certificates	
Guarantees / warranties	

# Worksheet 2-C (Continued) **Location of Family Documents**

Record or Document	Location
Health records	
Income property records	
Insurance policies	
Keys / properties	
Keys / safe deposit box	
Keys / storage facility & other places	
Marriage / divorce records	
Military service records	
Mortgage documents	
Passports & visas	
Pedigrees for livestock & pets	

# Worksheet 2-C (Continued) **Location of Family Documents**

Property / deeds	
Receipts / tax records	
Savings accounts & passbooks	
Social security records	
Stocks & bonds / certificates	
Tax records:     current year 19     previous year 19	
Trusts records & information	
Unemployment benefits records	
Wills	
Other documents	

## **CATEGORY 3. PERSONAL INSURANCE**

#### Worksheet 3-A Life Insurance

Insurance Company	Insured	Policy No.	cy No. Beneficiary Type of Premiums  Coverage Pay On Amt.		Maturity Date		
Insurance Company & Local Agent	Insured Name	Folicy No.	Dellellcial y	Type of Coverage	Pay On	Amt.	Date
-							
				4:			
	O	mer Life insu	rance Informa	uon			

#### Worksheet 3-B Health & Hospitalization Insurance

Insurance Co. (Local Agent)	Insured Name	Policy No.	Type of Coverage	Premium Pay On Amt.	Benefits

# Worksheet 3-C Accident & Disability Insurance

Insurance Company	Insured	Policy	Policy	Premi	ium	
Insurance Company & Local Agent	Insured Name	Policy No.	Policy Type	Date	Amt.	Benefits & Coverage
			, ·			
						- <u></u>
						- <u></u>
·						

## CATEGORY 4. FINANCIAL RECORDS

#### Worksheet 4-A **Banking Accounts**

Account Name	Bank / Credit Union Address & Phone	Account ID	Account Type	Account Manager	Signatories

#### Worksheet 4-B **Financial Advisors**

Name	Address	Phone #
Accountant		
Attorney		
·		
Banker		
Executor of Will(s)		
Life Insurance Agent		
Health Insurance Agent		
Stock Broker		
Other		

#### Worksheet 4-C Contents of Safe Deposit Box

Item or Article	Description and / or Details	Property Of:

Additional sheets may be added as needed. A copy should be made for each responsible member of the family.

#### Worksheet 4-D **Record of Credit & Debit Cards**

Account in Name of:	# Cards Issued & to Whom	Account Number	Company Issuing Card	Address & Telephone	Expiration Date

#### Worksheet 4-E **Record of Debts**

Person or Company Owed	Address & Telephone #	Amount Owed	Payment Due Date	Final Payment Date

## Worksheet 4-F Record of Money Owed Us

Due From	Address & Telephone No.	Amount(s) Due	Payment Due Date	Final Payment Date

#### Worksheet 4-G Record of Personal Property Loaned to Others

Item Loaned / Description	Name / Address / Telephone	Notice Date	Due Date

#### Worksheet 4-H **Equities in Stocks, Mutual Funds, Treasuries, & Corporate Bonds**

Company / Instrument	Certificate	Purchase Date	No. of Shares	Cost per Share	Registered in Whose Name
Company / Instrument	Certificate Serial #(s)	Date	Shares	Share	Registered in Whose Name

## Worksheet 4-I Precious Metals & Other Investments

Account in Name of:	Account Type	Name & Address of Institution (Bank / Depository / Security Company)	Account Number

### **CATEGORY 5. REAL ESTATE & PROPERTY**

#### Worksheet 5-A **Real Estate & Property Insurance**

(automobiles, trucks, boats, & any personal property requiring title or insurance as a condition of use or ownership)

Incurance Company & Address	Dranarty Inquired		Coverage	Dror	nium
Insurance Company & Address (Name of Local Agent)	Property Insured (Home/Apt., Furnishings, Auto)	Insurance Type	Coverage Amount	Due	Amt.
(Ivalile of Local Agent)	(Home/Apt., Furnishings, Auto)		Amount	Due	AIII.

## Worksheet 5-B Property & Household Inventory<sup>2</sup>

Item / Description	Date Acquired	Cost Basis	Market Value	Source of Val- uation

Additional sheets may be added. Copy this page as needed to complete your inventory.

<sup>&</sup>lt;sup>2</sup>A property and household inventory will be extremely helpful in determining how much insurance coverage is needed to protect your investments. The inventory also furnishes a valid record on which to base claims should a loss occur. One method of inventorying your household goods is by going through the house, room by room, closets, bathrooms, attic, basement, and any other storage space, and tag all possessions with a "sticky label", item by item, until everything you own is accounted for, identified, and all values determined.

Another method is to take photographs, identifying with details on the back of the photos, appropriate inventory and purchase dates, costs, or current price, and/or value at time of purchase. It's easier to make an audio recording to describe the photos.

An easier method is to record your possessions on video. Include everything on the walls, in the closets, items in the garage, and personal jewelry—anything that has value. It is so easy to do—if you don't own a video system, you can borrow or rent one for a weekend. Include verbal descriptions and personal details as you record the items. Where known, clearly state the date of purchase and cost of each item.

Estimate values if exact figures are not known. Keep sales receipts for substantial purchases. Record current market value and the current date. Current market value is the amount you could get if you sold the item now to a willing buyer. Be sure to include food storage and preparedness items in your household inventory. If you detail what you own, and have the facts duly recorded, you have proof of ownership.

Regardless of method used to inventory your possessions, place either the recorded original or a copy in a safe deposit box, if possible.

#### Worksheet 5-B (Continued)

Property & Household Inventory
Copy this page as needed to complete your property & household inventory.

Page	of

Item / Description	Date Acquired	Cost Basis	Market Value	Source of Val- uation
·	Acquired	Dasis	value	uation
	Į.	l	l	

## Worksheet 5-C Photos & Videos of Property & Household Items

Album, Tape, or Videotape No.	Property Record (Write or Record Details on Tape)	Room or Property	Photos / Tapes Stored at:

## Worksheet 5-D Real Estate & Property Descriptions

Type of Property (Personal / Business)	Real Estate / Property Description	Location	Documentation Located at:

#### Worksheet 5-E **Real Estate Financials**

Owner(s) & Type of Ownership	Date of	Original Cost	Mortgage Amount	Payments			
Ownership	Purchase	Cost	Amount	Interest	Principal	Escrow Account	Date Due

Additional Notes on Real Estate Financials					

#### Worksheet 5-F Major Home Improvements

Date	Description of Major Home Improvements (Proof of purchase price and receipts required)	Cost
Proof of pu	rchase price and receipted bills for improvements are located at:	

## CATEGORY 6. BUSINESS INFORMATION

#### Worksheet 6-A **Business Interests**

Employer:		
Address:		
Telephone:	Fax:	
Date of employment:	Name of immediate supervisor	<b>::</b>
Sole Propri	ietor/Partner/Owner of Busi	ness:
Name of business:		
Type of Business: Sole proprietorship Business partner(s):		
Home address:	Т	`el
Partnership agreement? Yes No	Date Filed:	
Partnership (Buy-sell agreement) insuran	ce? Yes No Date	Filed:
Copies of contracts & policies location:		
Instructions for supervision or sale of bus	iness are located at:	
ACCOUNTANT:		
Address:		
ATTORNEY:Address:		Tel
BUSINESS CONSULTANT:		Tel.
Address:		
BUSINESS ASSOCIATE:		
Address:		
ASSOCIATE:		Tel
Address:		

#### Worksheet 6-B Business Property Insurance

Insurance Company & Address (Local Agent)	Property Insured (Office, Equipment, Furniture, Personal Computers & Software, Trucks, Autos, etc.)	Type of Insurance	Coverage Amount	Prem Due	ium Amt.
	Additional Notes on Business	Documents			

Additional Notes on Business Documents

## CATEGORY 7. GUIDELINES FOR SURVIVORS

## Worksheet 7 Final Disposition Information & Guidelines

My name is:					
•	first	middle/maid	en	las	st
When I die, pleas	se contact:				
		name		relationship	
		address		phone #	
My important pa	apers are located a	at:			
	Information	on for Death Certific	ate & Filing for	Death Be	nefits
My address is	street	city	county	state z	ip code
Citizen of		•	•		Date of Birth
Social Security N	lumber	Occi	i <b>pation</b> /type of t	ousiness: _	
Veteran of:	branch of service		serial number		rank
	branon or sorvice	•	oonal number		Turn
date & place e	ntered service	date dischar	ged	be	enefits/entitlements
I was: 🗆 married	d □ never marrio	ed □ widowed □ sep	arated 🗆 divord	ced 🗆 ren	narried
Snouse's full (mg	niden) name:				
•	,				
	<b>kin</b> (other than sp	ouse):		Rel	ationship:
Address:					
Fathar's full nam	as and hirthnlass	2:			
rather sium han	ie and bii tiipiact				
Mother's maiden	name and birth	olace:			
Siblings: names a	and birthplaces:				

## Worksheet 7 (Continued) Final Disposition Information & Guidelines

# **Preferences After Death:** □ **Autopsy** if doctor or family deems it necessary. **Disposition of Body** □ **Donate my body's organs:** □ arrangements made on \_\_\_\_\_ with \_\_\_\_\_ ☐ **Cremation** ☐ scatter ashes:\_\_\_\_\_ ☐ Bury container: \_\_\_\_\_ location ☐ **Funeral Arrangements**: ☐ Simple ☐ No embalming $\square$ No public viewing $\square$ Least expensive burial or cremation container ☐ Immediate disposition ☐ Bury at: \_\_\_\_\_ ☐ Services: $\square$ memorial (after disposition) $\square$ funeral (before disposition) $\square$ graveside ceremony at: ☐ my church □ mortuary □ other I have made pre-arrangements with: \_\_\_\_\_ name/address of mortuary Signature: \_\_\_\_\_\_ Date: \_\_\_\_\_ Witness: \_\_\_\_\_ Date: \_\_\_\_ Witness: \_\_\_\_\_\_ Date: \_\_\_\_\_ Additional Disposition Instructions (Pallbearers, etc.)

Additional sheets may be added as needed. A copy of this form should be completed for each member of the family.

