

WHAT

# MY FAMILY SHOULD KNOW



MY FAMILY



**FREEDOM  
FINCARE**  
MAKING YOU FINANCIALLY STRONG

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Mobile / Phone (Self) : \_\_\_\_\_

**READY REFERENCE:**

		Name	Office Address	Residence Address	Mobile/ Contract Number
A	Family Doctor				
B	Financial Planner				
C	Tax Consultant				
D	Insurance Agent				
E	Stock Broker				

**DOCUMENT DETAILS:**

	Name	Number	Expiry Date
A	Passport		
B	Driving license		
C	Credit Cards / ATM Cards		
D	Club Membership Professional Others		
E	Vehicle Details		
E	Income Tax PAN No.		
E	Aadhar Card		

## LOCATION OF IMPORTANT DOCUMENTS

A	Personal Will	
B	Spouse's Will	
C	Insurance Policies	
D	Invest. Papers	
E	Property Records	
F	Birth Certificate	
G	Marriage Certificate	
H	Domicile Certificate	
I	Important Agreements	
J	Other Important Papers	

## INSURANCE - LIC POLICY DETAILS

Sr. No.	Name/ Nominee	Policy No./ Issuing Office	Amt. Insured	Issue Date/ Maturity Date	Table & Term	Premium	Remarks
A				Date Of Last Payment Date Of Maturity			
B				Date Of Last Payment Date Of Maturity			
C				Date Of Last Payment Date Of Maturity			

## MEDI CLAIM POLICY DETAILS

Sr. No.	Name & Type of Policy	Policy No./Previous Policy No.	Amt. Insured	Issue Date/Maturity Date	Premium	Remarks
1	Floater Policy					
2						

## VEHICLE INSURANCE POLICY DETAILS

Sr. No.	Name/Vehicle	Policy No./Issuing Office	Amt. Insured	Issue Date/Maturity Date	Premium	Remarks
1	Reg. No. Model Name & No. Engine No. Chassis No. Mfg Yr. CC- Nominee- Agent Name & Mobile No.			Valid till		
2						
3						

## FIRE / BURGLARY INSURANCE DETAIL

Sr. No.	Name of the Property / Nominee	Policy No./ Issuing Office	Amt. Insured	Risks Covered	Issue Date/Maturity Date	Premium (Rs.)	Remarks
1							
2							

Bank Name	Branch	Type of Account	Operating Instructions	Nominee/s	Specimen Signature

[illegible]

## Mutual Funds

Folio Number	Name of Fund	Applicant	Nominee	Total Amount Invested

**Mission** – We are on a Mission to Educate People about Financial Literacy and Empower them to Live a Financially Confidence and Stress-Free Life Through OurFreedom Money Management Process.



**SHARES/UNITS/DEBENTURES/BONDS: Standing in own name or Jointly with**

Company	No. of Shares	Demat A/c. No.	Demat Bank details	Demat Statement location	Held Singly / Jointly

**LOCKERS**

Bank Name & Branch	Locker No.	In the Name of	Code	Rent (Rs.)	Rent Renewal Date	Nominee	Contents

## PUBLIC PROVIDENT FUND (PPF)

Bank Name & Branch	Fvg.	PPF A/c. No.	Maturity Date	Nominee/s

## PENSION A/C.

Bank Name & Branch	Type of Account & Pension A/c. No.	Operating Instructions	Pension Payment Order No.	Nominee/s	Due Date for Live Certificate	Signature

## ATM / DEBIT CARD DETAILS

Sr. No.	Name	SB A/c. No. / Bank & Branch	ATM / Debit Card No.	Issue Date	Valid Thru	CVV No.	Remarks
1							
2							
3							
4							
5							
6							
7							

## CREDIT CARD DETAILS

Sr. No.	Name	Bank's Name	ATM / Credit Card No.	Valid From	Valid Thru	CVV No.	Remarks / T-Pin
1							
2							
3							
4							
5							



## PANCARD DETAILS

Sr. No.	Name	Father's/ Husband Name	PANCARD No./Issue Dt.	Contact Details
1				
2				
3				
4				

## PASSPORT DETAILS

Sr. No.	Name	Passport No.	Issue Date	Expiry Date	Issuing Authority	Previous Passport Details

## ELECTRICITY DETAILS

Sr. No.	Name	House Details	Meter No.	Customer No.	Deposit Rs.	Remarks
1						
2						

## GAS PIPE LINE DETAILS

Sr. No.	Name	House Details	Meter No/Route No	Consumer No/Khata No.	Deposit Rs.	Remarks
1						

## GAS CYLINDER AGENCY SERVICE DETAIL

Sr. No.	Name	House Details	Consumer No.	IOC Serial No.	Deposit Rs.	Remarks
1						

## LAND LINE DETAILS

Sr. No.	Name	House Details	Phone No.	Customer ID/Account No.	Deposit LL/ Broad Band Wi FI Rs.	Remarks
1						

## DRIVING LICENSE DETAILS

Sr. No.	Name	Driving License No. / Licencing Authority	Issue Date/CDOI	Valid Details / Valid From	Valid Till	Remarks / Blood Group
1						
2						
3						
4						

## RATION CARD DETAILS

Sr. No.	Name	Ration Card No./ Issuing Authority	Issue Date	Remarks
1				
2				
3				
4				

## AADHAR CARD - UID DETAILS

Sr. No.	Name	Aadhar Card No./ Enrollment No.	Issue Date	Remarks
1				
2				
3				
4				

## ELECTION IDENTITY CARD - DETAILS

Sr. No.	Name	Father's/Husband's Name	Identity Card No.	Issue Date
1				
2				
3				
4				

## HOUSE PROPERTY

Property Detail & standing in the name of:	How acquired (Inherited / Loan) Bank Loan Detail: Loan Amt. Inst. Amt. O/s. Amt.	Registration No. / Share Certificate No	Nominee if any	Property Card No. and valid upto	House Tax (Rs.)	Next Due Date of House Tax	Ins. Policy No., Amt. & Due Date	Risk/s covered	Mortgage with Bank Name & Branch / Place of Docs.

## HOUSE TAX DETAILS

Sr. No.	Name	House Details	Census No.	Property Identification No. (PIN)	Construction Sq. Mtrs.	Remarks
1						
2						

## INCOME TAX

Permanent Account No.	Ward No. and Office Address	Last Return Filed	File No.

**WILL:**

My will is executed on : .....

Copy of the will is kept at : .....

**POWER OF ATTORNEY**

★ Power of Attorney executed for Wife/Son/Others

★ My Power of Attorney is

★ Deed Executed on

★ Details kept in File No.

**MY DEBT / LIABILITIES**

**(a)** I am guarantor of Mr.

Give complete details:

1.

2.

**(b)** I have borrowed from :

(Give complete details)

**(c)** Other Liabilities