

PERSONAL RECORD BOOK

This document mimics a tool developed by the Presbyterian Foundation Group to help you organize information and record your possessions. It has been modified by Trinity Presbyterian Church into an Adobe Acrobat document that can be completed and saved on a computer. Upon completion, it will provide a clear and current record of your personal and financial information. It can be used to prepare an estate plan; it is also a convenient way of organizing information for your loved ones. You may wish to provide a copy to a family member and your executor as a safeguard against loss. This document should not be returned to the Presbyterian Foundation Group or Trinity Presbyterian Church or their representatives.

Update your records annually. You should save a fresh copy of the document with the current date every time you look it over even if you don't change any of the information. This will assure the user of the current accuracy of the entries.

If you need more space for some items, please go to the last page of this document where extra space has been provided.

This record book is for:

The latest revision date is:

The latest review date is:

PERSONAL INFORMATION

Date of my birth:

My place of birth was:

I have a birth certificate: Yes No

My birth certificate is located:

Date and place of naturalization or immigration if not a U.S. citizen by birth.

My father's full name:

My mother's full name:

My religious affiliation is:

My church is:

Current Marital Status: Single Married Widowed Divorced Separated

Spouse's Name

Date & State married

Certificate located

Previous marriage(s)

Date Name

Marriage ended by: Death Divorce Date & State

Children:

Name

Address

Name

Address

Name

Address

Military Service: Dates Service

Serial No.

Discharge papers located at

LIVING WILL DIRECTIVE AND ORGAN DONATION

I have a living will directive stating my wishes for medical care and treatment if I am seriously ill.

The document is dated and is located

The names and addresses of individuals having copies are:

Name Phone

Address

Name Phone

Address

Name Phone

Address

I have agreed to donate organs to (organization)

The papers are located

I have given the following person durable power of attorney which will go into effect upon my inability to act for myself. Name Phone

Address

LAST WILL AND TESTAMENT

Will written Located

Executor of Will

Address

Lawyer who prepared my will is

Firm

Location

In my will, I have left the following charitable bequest(s):

Charity

Bequest Amount

Charity

Bequest Amount

Charity

Bequest Amount

FUNERAL AND BURIAL ARRANGEMENTS

I have given instructions regarding my funeral in: Will Letter Other

I own: Cemetery plot Cemetery vault None

Name and location

Phone

Section No. Plot No.

Location of deed

Other funeral arrangements made

BANK ACCOUNTS AND SAFETY DEPOSIT BOX

Checking Account:

Bank Account Number Joint Individual

Bank Account Number Joint Individual

Savings Account:

Bank Account Number Joint Individual

Bank Account Number Joint Individual

Bank Account Number Joint Individual

Safe Deposit Box Location

Box Number Key Location

RETIREMENT ACCOUNTS

Company Name

Address

Account No.

Beneficiary

Company Pension

Social Security

Individual Retirement Account - 401(k) or 403(b)

Annuities

Beneficiary(ies)

Other retirement benefits

Beneficiary(ies)

INVESTMENTS

I own various stocks and bonds, held in street name, which are located at

Stocks/Bonds/Mutual Funds that I hold directly:

Company

Shares Date Purchased Cost Basis

Company

Shares Date Purchased Cost Basis

Company

Shares Date Purchased Cost Basis

Records of purchase and sale are located at

I own U.S. Savings Bonds under the following ownership registrations:

My name alone

Joint with

Type

Face Value

Issue Date

Maturity Date

Serial Number

Type

Face Value

Issue Date

Maturity Date

Serial Number

Certificates of Deposit

Bank	Amount	Date of Redemption
Bank	Amount	Date of Redemption

Partnerships

TRUST FUNDS

Here are brief descriptions of my deposits:

Testamentary Trust

Trustee
Assets in the trust
Beneficiaries
Attorney of Record
Firm
Address

Charitable Remainder Trust

Trustee
Assets in the trust
Income Recipients
Charitable Beneficiaries
Papers are located

Existing Trust

I have created a trust for the benefit of
Date it was established
The Trust Agreement is located

The attorney who drafted the Trust Agreement is:

Firm
Address

I am a beneficiary under a Trust established by:

Papers are located

PERSONAL EMPLOYMENT

My employer is (was)

Address

My employer has the following benefit plans in which I participate

Other business interests

I am presently covered by Social Security. Yes No

LIFE INSURANCE

Insurance policies owned by me on my life:

Insurance Company

Policy Numbers.

Amounts of policies

Location of policies

Beneficiary(ies)

Any unpaid loans?

Insurance Company

Policy Numbers.

Amounts of policies

Location of policies

Beneficiary(ies)

Any unpaid loans?

Insurance policies owned by others on my life (including charities)

Policy Information

Policy Owner

Company and Address

Insurance policies which I own on the lives of others:

Policy Information

Person insured

Company and Address

My insurance agents or brokers are:

Name

Phone

Company & Address

OTHER INSURANCE

I personally carry accident, disability, sickness, hospitalization and other such forms of insurance (this is in addition to and exclusive of any such insurance or benefits provided through my employer). Yes No

Company

Policy No.

Coverage

My insurance agent is

Phone

Location of policy(ies)

RESIDENCE AND OTHER REAL ESTATE

My residence address is

I own my residence Yes No

Ownership title is:

There is a mortgage on this property Yes No

It is held by

All of the documents concerning this property are located at:

I own other real estate located at

My homeowner's insurance broker is

Firm

Address

TANGIBLE PERSONAL PROPERTY

Automobile(s)

Jewelry

Art, Antiques, Collectibles

Complete inventory of my personal property is located at

PERSONAL DEBTORS AND CREDITORS (OBLIGATIONS)

Name of Debtor
Address
Amount owed to me

Name of Debtor
Address
Amount owed to me

Name of Debtor
Address
Amount owed to me

I have the following outstanding loans:

Creditor
Loan No.
Amount of Loan
Date of Final Payment

Creditor
Loan No.
Amount of Loan
Date of Final Payment

Credit Card Debt:

Company
Account No.
City State
Phone:

Company
Account No
City State
Phone

TAX RETURNS

My tax preparer is

Firm

Address

Copies of my income tax returns are located at

PERSONAL ADVISORS

Physician	Specialty
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Address	Phone
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Physician	Specialty
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Address	Phone
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Clergyperson	Phone
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Address

Attorney	Phone
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Address

Accountant	Phone
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Address

Insurance Agent	Phone
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Address

Trust Officer	Phone
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Address

Investment Broker	Phone
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Address

Tax Consultant	Phone
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Address

Other	Phone
-------	-------

Address

Other Person	Phone
--------------	-------

Address

Other Person	Phone
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Address

LOCATION OF IMPORTANT PAPERS

Vital Statistics
Trust Agreements
Last Will & Testament
Bonds and Securities
Bank Books
Insurance Policies
Business Agreements Titles & Deeds
Tax Papers:
Charitable Documents
Military Service Documents
Others

The Christian tradition of giving is both a privilege and an opportunity. What we now enjoy and cherish - our church, our schools, our hospitals - were in large part created by those who came before us. We all have the opportunity to follow this example by giving something of ourselves to assure the future of our Christian witness.

For additional copies of the original booklet, please visit www.PresbyterianFoundation.org or contact the Presbyterian Foundation at 200 East Twelfth Street, Jeffersonville, IN 47130 800.858.6127. For an additional copy of the Adobe Acrobat document, please contact Trinity Presbyterian Church, 1120 Darley Road, Wilmington, DE 19810 302-475-5495 or the church office by email at office@trinitypresby.org.

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