

Property

Type	Owner(s)	Type of Ownership	Date Acquired	Location/Description	Location of Title/ Ownership Information*	Additional Information
Real estate: Residence(s)						
Business(es)						
Timeshare(s)						
Cemetery plot(s)						
Motor vehicle(s)						
Other						

* Store titles, leases and other important ownership information in a safe-deposit box or fireproof, waterproof and burglarproof home safe.

Banking, Savings and Investments

Type	Financial Institution/Company	Address/Telephone	Owner	Location of Records*	Additional Information (if applicable)			
					I.D. #	Beneficiary	Price/Value(s)	Dates (purchase, maturity, etc.)
Checking account(s)								
Savings account(s)								
Money market account(s)								
Bonds, treasury bills, etc.								
Stocks, mutual funds, investment trusts, etc.								
Individual Retirement Accounts, Keogh accounts, SEPs								
Retirement plans, pensions, etc.								
Other								

* Savings and investment certificates, bonds, bills and other evidence of ownership (financial records difficult or costly to replace, or that could be transferred illegally in case of loss or theft) should be kept in a safe-deposit box or fireproof, waterproof and burglarproof home safe. Monthly statements and substitute or canceled checks, or their images, which generally can be replaced, can be kept in a home business center, file drawer, desk, etc.