



# WealthMunshi.com

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## What My Family Should Know

READY REFERENCE:

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

		Name	Office address	Residence address	Mobile / Contact number
A	Family Doctor				
B	Specialist Doctor (if any)				
C	Tax Consultant				
D	Insurance Agent				
E	Stock Broker				

DOCUMENTS DETAILS:

		Number	Expiry date
A	Passport		
B	Driving license		
C	Credit Cards / ATM Cards		
D	Club Membership Professional		
E	Vehicle Details		
F	Income Tax PAN No.		
G	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/Maturi ty Date	Table & Term	Premium	Remarks
1.	Nominee-	Through Mr.		Date of last payment  Date of Maturity			
2.	Nominee-	Through Mr.		Date of last payment  Date of Maturity			
3.	Nominee-	Through Mr.		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. <b>Model Name &amp; No.</b> Engine No. Chassis No. Mfg Yr. CC- <b>Nominee-</b> <b>Agent Name &amp; Mobile No.</b>			Valid till		
2.						
3.						

**FIRE / BURGLARY INSURANCE DETAIL:**

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











## LOCKERS

<b>Bank Name &amp; Branch</b>	<b>Locker No.</b>	<b>In the Name of</b>	<b>Code</b>	<b>Rent (Rs.)</b>	<b>Rent Renewal Date</b>	<b>Nominee</b>	<b>Contents</b>

## 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
1.						

### 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 Dt.	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 Details -

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

### BSNL 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.

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Address: Flat No-61207, 12th Floor, Maple Block, Indu Fortune Fields, Near Mmts Hitech City, Kphb Phase XIII, Kukatpally, Hyderabad-500072 (T.S) Tel: 040-40274284,

Mobile: 99853-98765, 93979-98765





