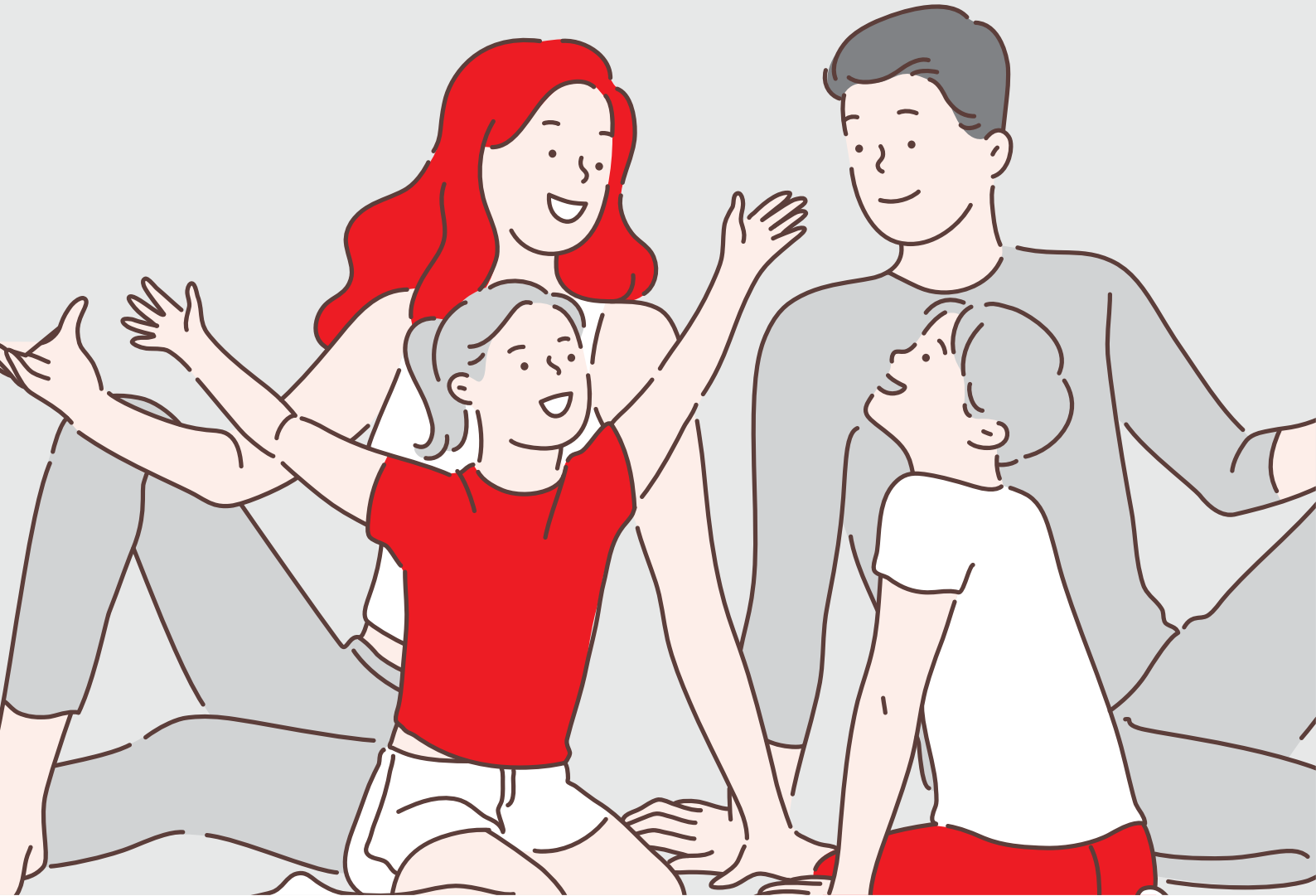




# MY FAMILY RECORD BOOK

A Book that will keep all your family's important information in one place | [www.lakshme.com](http://www.lakshme.com)



## life is beautiful; Record it for your future

The happiness of life is not measured in our wealth, how many bank accounts we own or the amount of property we have accumulated. It is all about the happiness we share with the ones who are closest to us. At the same time it is equally vital to keep them aware of all our holdings and our financial situation in case of any emergency, so that they are ready and well looked-after.

Introducing 'My Family Record Book' – an easy & convenient way of keeping all your personal and financial information at one place. Keep it as a physical or digital copy and make sure that your family is aware of it, so the purpose for which the savings and investments are made, to protect the family in case of uncertain times can be accomplished.

**“Kyun ki aap ke baad bhi , Aap ke documents kaam aayenge.”**

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## My Family Personal Details

Details	My Self	Spouse	First Child	Second Child
Full Name				
Birth Date				
Email ID				
Blood Group				
PAN No.				
Aadhaar No.				
Mobile No. <small>(linked with Aadhaar)</small>				
Driving License No.				
Voters ID Card No.				
Passport No.				
Ration Card No.				
Club Name & Membership No.				

## Emergency Contact Details

Details	Name	Contact No
Family Doctor		
Preferred Hospital Details		
Health Insurance Agent		
Life Insurance Agent		
Stock Broker		
Tax Consultant		
Office Colleague		

## My Home Service Details

Details	First Option		Second Option	
	Details	Contact No.	Details	Contact No.
Gas Consumer No.				
Gas Service Provider				
Electricity Account No.				
Electricity Service Provider				
Water Account No.				
Telephone Service No.				
Telephone Service Provider				
Washing Machine Service Provider				
Water Purifier Service Provider				
AC Repair Service Provider				
Refrigerator Service Provider				
Internet/ Wi-Fi Service Provider				
Tv/Cable Service Provider				
Plumber Details				
Electrician Details				
Grocery Store Details				
House Keeping				

## My Work Place Details

	Details	Contact No.
Name of the Company		
Employee No.		
Designation		
Gratuity No.		
EPF No.		
Name of the Boss		
Colleauge within the dept		
HR Dept		

## My Property Investment Details

	Property Owner	Purchase Year	Property Description (Location & Size)	Current Value	Contact Person & Number
Residential 1					
Residential 2					
Commercial 1					
Commercial 2					
Land 1					
Land 2					

## My Assets Investment Details

First Holder Name	Current/ Maturity Value	Invested Through	Contact Person	Contact Number
<b>Mutual Funds</b>				
<b>Shares</b>				
<b>Fixed Deposit/Recurring Deposit/Company Deposit</b>				
<b>Gold</b>				
<b>Bond/Debenture</b>				

## Loans and Advances given to others

Name of the borrower	Relationship	Outstanding Amount	Date of Loan given	Witness/ Guarantor	Contact No.

## Liabilities

Type of Loan	In the Name of	Bank/ Institution/ Person	Monthly EMIs	Outstanding Amount	Completion Date
Home Loan					
Vehicle Loan-1					
Vehicle Loan-2					
Consumer/Personal					
Loan Against Securities					
Gold Loan					
Education Loan					
Mortgage Loan					
Borrowing					

## Credit Card Details

	Issuer	Name on Card	Card Number	Expiry Date	Credit Limit
1					
2					
3					
4					

## Health Insurance Cover

### POLICY 1

<b>Policy Holder :</b>		<b>Members Covered:</b>
Service Provider:		Policy Date:
Policy No.:	No. of Insured persons:	Coverage Amount:
Premium Amount:	Premium Renewal Date:	
Agent Name:		Agent Phone No:
<b>Remarks:</b>		

### POLICY 2

<b>Policy Holder :</b>		<b>Members Covered:</b>
Service Provider:		Policy Date:
Policy No.:	No. of Insured persons:	Coverage Amount:
Premium Amount:	Premium Renewal Date:	
Agent Name:		Agent Phone No:
<b>Remarks:</b>		

### POLICY 3

<b>Policy Holder :</b>		<b>Members Covered:</b>
Service Provider:		Policy Date:
Policy No.:	No. of Insured persons:	Coverage Amount:
Premium Amount:	Premium Renewal Date:	
Agent Name:		Agent Phone No:
<b>Remarks:</b>		

## Life Insurance Cover

### POLICY 1

<b>Policy Holder :</b>		<b>Members Covered:</b>
Service Provider:		Policy Date:
Policy No.:	No. of Insured persons:	Coverage Amount:
Premium Amount:	Premium Renewal Date:	
Agent Name:		Agent Phone No:
<b>Remarks:</b>		

### POLICY 2

<b>Policy Holder :</b>		<b>Members Covered:</b>
Service Provider:		Policy Date:
Policy No.:	No. of Insured persons:	Coverage Amount:
Premium Amount:	Premium Renewal Date:	
Agent Name:		Agent Phone No:
<b>Remarks:</b>		

### POLICY 3

<b>Policy Holder :</b>		<b>Members Covered:</b>
Service Provider:		Policy Date:
Policy No.:	No. of Insured persons:	Coverage Amount:
Premium Amount:	Premium Renewal Date:	
Agent Name:		Agent Phone No:
<b>Remarks:</b>		

## Other Insurance Cover

### Motor Insurance

Service Provider:	Policy Date:
Policy No.:	Coverage Amount:
Premium Amount:	Premium Renewal Date:
Agent Name:	Agent Phone No:
<b>Remarks:</b>	

### Home Insurance

Service Provider:	Policy Date:
Policy No.:	Coverage Amount:
Premium Amount:	Premium Renewal Date:
Agent Name:	Agent Phone No:
<b>Remarks:</b>	

### Endowment/ Term plan

Service Provider	Holder Name	Insurance Cover	Maturity Date	Maturity Value	Contact Name & No

### Unit Linked Insurance Plan

Service Provider	Holder Name	Insurance Cover	Maturity Date	Maturity Value	Contact Name & No

## My Financial Account Details

Holder Name	Bank/ Institution	Branch	Account No.	Contact Name	Contact Number
<b>Savings/Current A/c</b>					
<b>Demat Account</b>					
<b>Post Office Account</b>					
<b>Pension Fund Account</b>					
<b>PPF Account</b>					
<b>Bank Locker</b>					

## Location of Important Documents

Type of Documents/Asset	Location
Personal Will	
Insurance Policies	
Fixed Deposit Receipts	
Tax Returns	
Shares/ Bonds/ Units Certificate	
Property Papers (House/Commercial)	
Loan Documents	
Gold Ornaments	
Bank Locker Keys	
Education/Marriage/Birth Certificates	
Cheque Book/Passbook	
<b>Other 1</b>	
<b>Other 2</b>	

## Important Links

Purpose	Website/URL	User Name	Password

## Important Contacts

### For Legal matter

Name:		Phone No:
Email Id:	Located at:	Reference:
Name:		Phone No:
Email Id:	Located at:	Reference:

### For Financial matter

Name:		Phone No:
Email Id:	Located at:	Reference:

### Chartered Accountant / Tax Consultant

Name:		Phone No:
Email Id:	Located at:	Reference:

### For Personal matter (Friends/Relative)

Name:	Phone No:	Email Id:
Name:	Phone No:	Email Id:
Name:	Phone No:	Email Id:

### Real Estate Agent

Name:		Phone No:
Email Id:	Located at:	Reference:

### Bank Relationship Manager

Name:		Phone No:
Email Id:	Located at:	Reference:



My  
**FAMILY  
RECORD  
BOOK**

