

# Personal Finance Organizer

Owner: \_\_\_\_\_  
\_\_\_\_\_

*We generate fears by sitting  
and we over come them by action*

... Dr. Henry link



## Important Contacts

	Name	Contact Number	Email ID	Office/Residence Address
Family Doctor				
Tax Consultant				
Insurance Agent				
Stock Broker				
.....				
.....				

## PIN Details

Name	Registered Email & Password	PIN Number	Password for IT Return

## National ID Details

Name	ID Number	Linked Mobile Number

## Passport Details

Name	Passport Number	Issue Date	Expiry Date	Issuing Authority

## Driving Licence Details

Name	Licence Number	Valid Till	Issue Date	Issuing Authority

## E-Citizen Details

Login ID	Password	Registered Email	Password

## NSSF & NHIF Details

Name	NSSF Number	Name	NHIF Number

## Bank Details

A/C Holder Name	Bank Name	Branch	Type of A/C	A/C Number	Operating Ins*	Nominee	Linked Mobile No.

Note: Operating Instructions means - Single / Joint / Either of Survivor / Anyone Or Survivor

## Locker Details

Bank Name	Branch With Contact Details	In the Name Of	Code / Locker No.	Rent	Rent Renewal Date	Nominee	Contents

## ATM/Debit Card Details

Card Holder Name	Bank Name & Branch	Bank A/C Number	Card Number	CVV No.	Valid Till	Linked Mobile No.

## Credit Card Details

Card Holder Name	Card Name	Card Number	CVV No.	Valid Till	Linked Mobile No. & Bank

## Location Of Important Documents

*Insurance Policies*

*Investment Papers*

*Property Papers*

*Birth Certificate*

*Marriage Certificate*

*Domicile Certificate*

*Important Agreements*

*Self / Spouse's Will*

*Locker Key*

*Other Important Papers*

Location

## Demat Accounts

A/C Holder Name	Demat A/C No.	Bank / DP Name	Held Single / Jointly	Nominee	Bank A/C Linked

## Mutual Funds

Holder Name	Fund / Scheme Name	Broker / Direct	ISIN(Physical / Demat)	Customer ID	Plan / Option	Nominee

## Bonds/Debentures

Bonds Description	Issuer	ISIN(Physical / Demat)	Coupon Rate	Coupon Frequency	Maturity Rate	Nominee

## House Property / Land Property Details

Property details & in Name of	Share Certificate No.	Registered No.	Nominee	Insurance Details	Details of Mortgage with Bank

## Pension Account

Bank Name / Branch	Types of A/C & No.	Operating Ins*	Pension Payment Order No.	Nominee	Due Date For Live Certificate

Note: Operating Instructions means Single / Joint / Either of Survivor / Anyone or Survivor

## Fixed Deposit / Recurring Deposit / Company Deposit

Holder Name	Bank / Co. Name	Branch Deposits	FDR No.	Date of Deposit	Date of Maturity	Interest Payout	Amount	Nominee	Loan / OD Availed

## Life Insurance

Policy Name	Policy No.	Amount Insured	Issue Date	Maturity Date	Insured	Annual / One Time Premium	Nominee	Agent/Direct

## General Insurance (Health / Vehicle)

Policy Name	Policy No.	Floater / Individual	Amount Insured	Issue Date	Renewal Date	Premium	Remarks*	Agent / Direct

Note: Important details to be put in remarks ex: For 'Vehicle Insurance', put the details of car (Model Number, Chassis Number, Engine Number, Year of Manufacturing).



# Will & Debt Details

*Will - Last Will Dated ( \_\_/\_\_/\_\_ )*

	Name	Give Complete Details with Contact Number
<i>Executor</i>		
<i>Witness</i>		
<i>Power Of Attorney</i>		

*Debts / Liabilities / Loans*

	Debts / Liabilities / Loans	Complete Details	Details of Security Kept
<i>I have borrowed from</i>	1)		
	2)		
	3)		
<i>I am Guarantor of</i>	1)		
	2)		
	3)		
<i>Other Liabilities</i>	1)		
	2)		
	3)		

# Income Tax Details

PAN No.	Ward No.	Office Address	File No.

