

Family Records Almanac

Using the Family Records Almanac can be a major step toward gaining control over the vast amount of information that is important to you and your family. The documents you can download and print can serve as the basis for organizing and storing important information and documents.

After printing the pages of the Almanac, you may want to store them in a binder for convenience. You may also wish to consider using plastic storage sleeves to hold the documents that correspond to the information you record.

After reviewing the Almanac pages, start gathering the information you want to enter and the documents you want to keep. You may also wish to get other members of your family involved in this process.

As you gather your information, you may also find that you wish to include more items such as a family tree or information on your pets.

It seems that our lives continue to get more complicated and that we are overloaded with information. Knowing what to keep and having an organized way of keeping the things that are important is not always easy.

The Family Records Almanac can make the task easier. Having your important information in a central location can help provide the peace of mind knowing that you can easily find what you need when you need it.

Table of Contents

Family Information and History

- Family Birth and Social Security Information
- Passports, Driver Licenses & Other Travel Documents
- Family History
- Family Weddings and Other Important Ceremonies
- Education and Technical and Professional Certificates
- Military Service and Separation/Divorce

Permanent Calendar

Financial Security

- Primary Accounts – Banks, Savings & Loans, Credit Unions
- Investment Relationships – Brokerage Accounts
- Investment Relationships – Mutual Fund Accounts
- Investments – Stocks & Bond
- Other Investments or Trusts
- Retirement Plan Accounts
- Places of Safekeeping

Insurance

- Life Insurance
- Property Insurance
- Health Insurance
- Vehicle Insurance

Home and Other Property

- Real Estate
- Property You Rent
- Repair People
- Vehicles
- Other Property

Other Finances

- Credit Cards
- Lines of Credit and Loans
- Accountant, Estate Planning Professional and Important Documents

Organizations and Affiliations

- Frequent Flier Information
- Other Organizations