

# Jagoinvestor.com

## Personal Finance First-aid kit

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**Purpose** : This document will serve as a emergency guideline document in case of the death of main bread winner of the family. This document can also be used as a reference point for all important information regarding finances .

### 1. Primary Documents

Document	Number	Location	Expiry date
Passport	-	-	-
Driving Licence	-	-	-
PAN Card	-	-	-
Voter ID Card	-	-	-
Employee Providend Fund	-	-	-
Public Provident Fund	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-

### 2. Important Contact Persons

Contact Type	Name	Phone	Email
Lawyer	Ramesh Gupta	9874566363	ramesh@in.com
Stock Broker	-	-	-
CA	-	-	-
Insurance Agent (SBI)	-	-	-
Insurance Agent (LIC)	-	-	-
Financer Planner	-	-	-
Doctor	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-

### 3. Critical Documents & Papers

Document	Location	Contact for Help
Will	-	Ramesh Gupta ( 9874566363)
Birth Certificate	-	-
Important Keys	-	-
Insurance Policies	Bottom corner of Black Almirah	-
Property Papers	-	-
Home Loan documents	-	-
EPF	-	-
PPF	-	-
Power of Attorney	-	-
Medical Records	-	-
Birth Certificate	-	-
Marriage Certificate	-	-
Vehicle Registration Certificate	-	-
Bank Account Records	-	-
NSC/Kisan Vikas Patra	-	-
Demat A/c Statements	-	-

### 4. Important Instructions

Instruction 1 (Insurance Claim Procedure)
<p><b>Descripton :</b></p> <p><b>Steps :</b></p>

Instruction 2 (How to redeem Mutual Funds)
<p><b>Descripton :</b></p> <p><b>Steps :</b></p>

#### 4. Bank Details

Bank Name	A/C Number	Nominee	Branch Location
SBI Bank	-	-	-
ICICI Bank	-	-	-
-	-	-	-

#### 5. Financial Liabilities

Bank Name	Amount	Notes
Home Loan	-	-
Car Loan	-	-
Credit Card	-	-
Loan given to Robert	-	-
-	-	-
-	-	-

#### 6. More ?

Notes