

# *The*

*(Personalise this by typing your surname above)*

# *Family Book of Records*



# *Your dreams and plans, Open for their eyes only.*

This book is designed to help you consolidate all financial records, important contacts and vital information that your family needs in one place.

A simple, safe way to share what matters most with your loved ones.

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# *Important Details*



# Contacts

## FAMILY DOCTOR

Name : ..... Landline No. : .....  
Phone No. : ..... Email id: .....  
Office Address: .....

## SPECIALITY DOCTOR 1

Name : ..... Landline No. : .....  
Phone No. : ..... Email id: .....  
Office Address: .....

## SPECIALITY DOCTOR 2

Name : ..... Landline No. : .....  
Phone No. : ..... Email id: .....  
Office Address: .....

## LAWYER

Name : ..... Landline No. : .....  
Phone No. : ..... Email id: .....  
Office Address: .....

## BANK RELATIONSHIP MANAGER

Name : ..... Landline No. : .....  
Phone No. : ..... Email id: .....  
Office Address: .....

## TAX CONSULTANT / CA

Name : ..... Landline No. : .....  
Phone No. : ..... Email id: .....  
Office Address: .....

## INSURANCE AGENT

Name : ..... Landline No. : .....  
Phone No. : ..... Email id: .....  
Office Address: .....

## STOCK BROKER

Name : ..... Landline No. : .....  
Phone No. : ..... Email id: .....  
Office Address: .....

## EMERGENCY CONTACT 1

Name : ..... Landline No. : .....  
Phone No. : ..... Email id: .....  
Address:  
(Home) .....  
(Office) .....

## EMERGENCY CONTACT 2

Name : ..... Landline No. : .....  
Phone No. : ..... Email id: .....  
Address:  
(Home) .....  
(Office) .....

# Important Personal Information

## CREDIT CARDS

Bank	Number	Issue Date	Expiry Date
.....	.....	.....	.....
.....	.....	.....	.....
.....	.....	.....	.....

## PASSPORT DETAILS

Name	Passport No.	Issue Date	Expiry Date	Previous Passport Details
.....	.....	.....	.....	.....

## OTHER DOCUMENTS

Document	Number	Expiry Date
Driving License	.....	.....
PAN Card	.....	.....
Aadhaar Card	.....	.....
Ration Card	.....	.....
Club Membership	.....	.....
Vehicle details	.....	.....
Others	.....	.....

# Important Personal Information

## LOCATION OF IMPORTANT DOCUMENTS

Document	Location
Personal Will	..... <input type="checkbox"/>
Spouse's Will	.....
Insurance Policies	.....
Investment Papers	.....
Property Records	.....
Birth Certificate	.....
Marriage Certificate	.....
Domicile Certificate	.....
Important Agreements	.....
Other Important Papers	.....

## ELECTRICITY DETAILS

Name	House Details	Meter No.	Consumer No.	Deposit Rs.
.....	.....	.....	.....	.....
.....	.....	.....	.....	.....

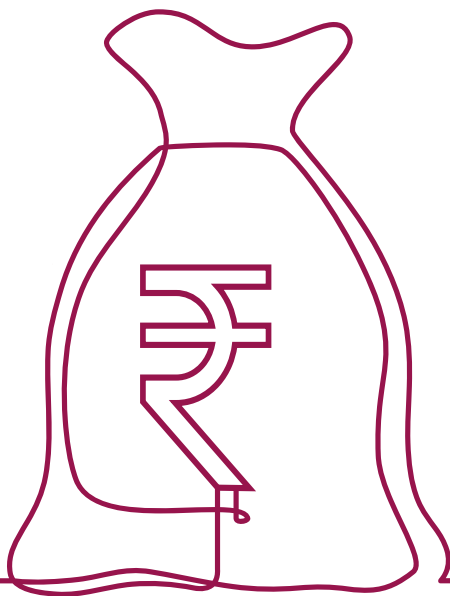
## GAS PIPELINE DETAILS

Name	House Details	Meter No.	Consumer No.	Deposit Rs.
.....	.....	.....	.....	.....
.....	.....	.....	.....	.....

## GAS CYLINDER AGENCY SERVICE DETAILS

Name	House Details	Consumer No.	IOC Serial No.	Deposit Rs.
.....	.....	.....	.....	.....

# *Banking*



# Key Account Details

Bank/Company Name : ..... Branch : .....  
Type of Account : ..... Account No. : .....  
Customer ID : ..... Nominee(s) : .....  
Debit Card No. : ..... Issue Date : ..... Expiry Date : .....

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Bank/Company Name : ..... Branch : .....  
Type of Account : ..... Account No. : .....  
Customer ID : ..... Nominee(s) : .....  
Debit Card No. : ..... Issue Date : ..... Expiry Date : .....

---

Bank/Company Name : ..... Branch : .....  
Type of Account : ..... Account No. : .....  
Customer ID : ..... Nominee(s) : .....  
Debit Card No. : ..... Issue Date : ..... Expiry Date : .....

---

Bank/Company Name : ..... Branch : .....  
Type of Account : ..... Account No. : .....  
Customer ID : ..... Nominee(s) : .....  
Debit Card No. : ..... Issue Date : ..... Expiry Date : .....

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Bank/Company Name : ..... Branch : .....  
Type of Account : ..... Account No. : .....  
Customer ID : ..... Nominee(s) : .....  
Debit Card No. : ..... Issue Date : ..... Expiry Date : .....

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# Key Account Details

**DEMAT ACCOUNT:**

Bank/Company Name : .....

Demat Account No : ..... Customer ID : .....

Nominee(s) : .....

Remarks: .....

---

Bank/Company Name : .....

Demat Account No : ..... Customer ID : .....

Nominee(s) : .....

Remarks: .....

---

Bank/Company Name : .....

Demat Account No : ..... Customer ID : .....

Nominee(s) : .....

Remarks: .....

---

Bank/Company Name : .....

Demat Account No : ..... Customer ID : .....

Nominee(s) : .....

Remarks: .....

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**PENSION ACCOUNT:**

Bank/Branch : ..... Type Of Account : .....

Account No. : ..... Pension Payment Order No. : .....

Operating Instructions. : .....

Nominee(s) : ..... Due Date for Live Certificate: .....

# Key Account Details

**LOCKERS**

Bank/Branch Name : .....

Locker no : ..... In the Name of : .....

Nominee(s) : .....

Contents : .....

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Bank/Branch Name : .....

Locker no : ..... In the Name of : .....

Nominee(s) : .....

Contents : .....

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Bank/Branch Name : .....

Locker no : ..... In the Name of : .....

Nominee(s) : .....

Contents : .....

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**PPF ACCOUNT:**

Bank/Company Name : .....

In Favor of (Name) : .....

Account No. : ..... Maturity Date. : .....

Nominee(s) : .....

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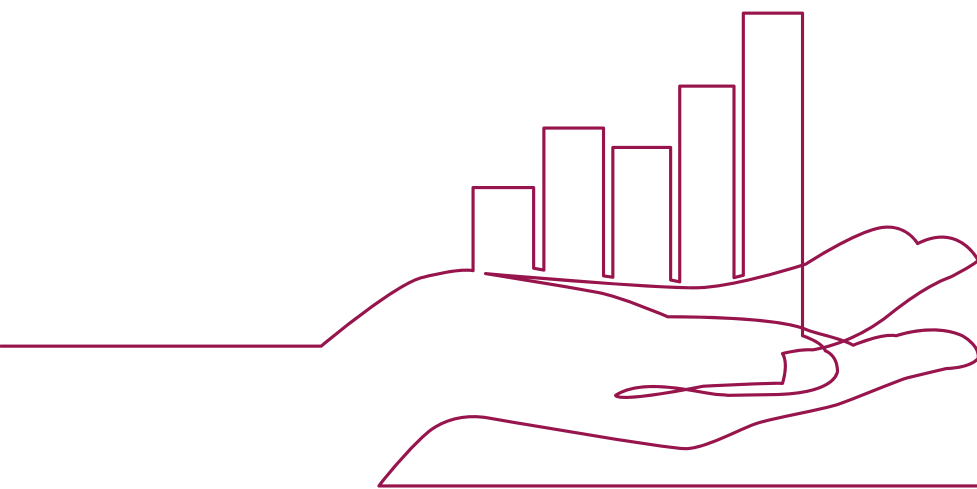
Bank/Company Name : .....

In Favor of (Name) : .....

Account No. : ..... Maturity Date. : .....

Nominee(s) : .....

# *Investments*



# FDs/ RDs/ Company Deposits

Bank/Company Name : .....

Branch : ..... Type of Deposit (SDR, FDR, RD) : .....

Deposit No. : ..... Amount : .....

Date of Deposit : ..... Due Date : .....

In Favor Of (Name) : ..... Loan/ OD Availed: .....

Nominee(s) : .....

Operating Instructions : .....

---

Bank/Company Name : .....

Branch : ..... Type of Deposit (SDR, FDR, RD) : .....

Deposit No. : ..... Amount : .....

Date of Deposit : ..... Due Date : .....

In Favor Of (Name) : ..... Loan/ OD Availed: .....

Nominee(s) : .....

Operating Instructions : .....

---

Bank/Company Name : .....

Branch : ..... Type of Deposit (SDR, FDR, RD) : .....

Deposit No. : ..... Amount : .....

Date of Deposit : ..... Due Date : .....

In Favor Of (Name) : ..... Loan/ OD Availed: .....

Nominee(s) : .....

Operating Instructions : .....

---

Bank/Company Name : .....

Branch : ..... Type of Deposit (SDR, FDR, RD) : .....

Deposit No. : ..... Amount : .....

Date of Deposit : ..... Due Date : .....

In Favor Of (Name) : ..... Loan/ OD Availed: .....

Nominee(s) : .....

Operating Instructions : .....

# FDs/ RDs/ Company Deposits

Bank/Company Name : .....

Branch : ..... Type of Deposit (SDR, FDR, RD) : .....

Deposit No. : ..... Amount : .....

Date of Deposit : ..... Due Date : .....

In Favor Of (Name) : ..... Loan/ OD Availed: .....

Nominee(s) : .....

Operating Instructions : .....

---

Bank/Company Name : .....

Branch : ..... Type of Deposit (SDR, FDR, RD) : .....

Deposit No. : ..... Amount : .....

Date of Deposit : ..... Due Date : .....

In Favor Of (Name) : ..... Loan/ OD Availed: .....

Nominee(s) : .....

Operating Instructions : .....

---

Bank/Company Name : .....

Branch : ..... Type of Deposit (SDR, FDR, RD) : .....

Deposit No. : ..... Amount : .....

Date of Deposit : ..... Due Date : .....

In Favor Of (Name) : ..... Loan/ OD Availed: .....

Nominee(s) : .....

Operating Instructions : .....

---

Bank/Company Name : .....

Branch : ..... Type of Deposit (SDR, FDR, RD) : .....

Deposit No. : ..... Amount : .....

Date of Deposit : ..... Due Date : .....

In Favor Of (Name) : ..... Loan/ OD Availed: .....

Nominee(s) : .....

Operating Instructions : .....

# Mutual Funds

Company : ..... Mutual Fund name : .....

Portfolio number/ID : ..... Plan Type : .....

Start Date : ..... Amount invested in SIP (Rs) : .....

Nominee(s) : .....

Remarks : .....

---

Company : ..... Mutual Fund name : .....

Portfolio number/ID : ..... Plan Type : .....

Start Date : ..... Amount invested in SIP (Rs) : .....

Nominee(s) : .....

Remarks : .....

---

Company : ..... Mutual Fund name : .....

Portfolio number/ID : ..... Plan Type : .....

Start Date : ..... Amount invested in SIP (Rs) : .....

Nominee(s) : .....

Remarks : .....

---

Company : ..... Mutual Fund name : .....

Portfolio number/ID : ..... Plan Type : .....

Start Date : ..... Amount invested in SIP (Rs) : .....

Nominee(s) : .....

Remarks : .....

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Company : ..... Mutual Fund name : .....

Portfolio number/ID : ..... Plan Type : .....

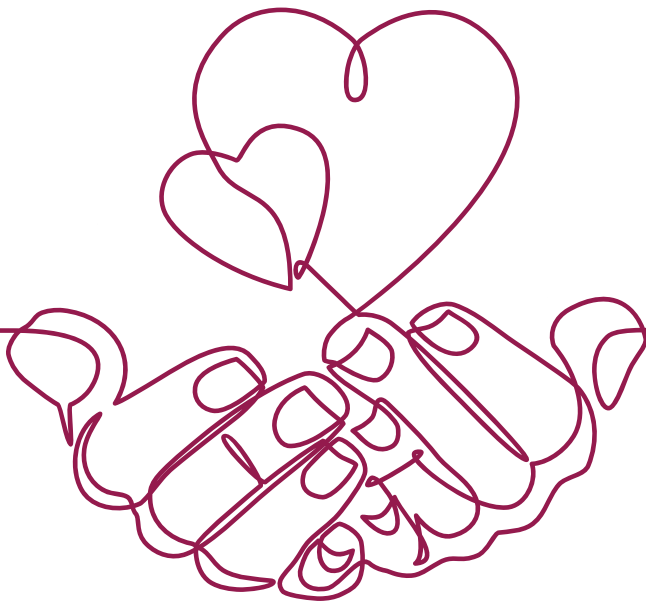
Start Date : ..... Amount invested in SIP (Rs) : .....

Nominee(s) : .....

Remarks : .....

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# *Insurance*



# Life Insurance/ Term Insurance

Policy Name : ..... Customer Id : .....  
Name of Insured Persons : ..... Policy No. : .....  
Amount Insured : ..... Maturity Amount : .....  
Issued date : ..... Maturity Date : .....  
Premium Amount : ..... Nominee(s) : .....

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Policy Name : ..... Customer Id : .....  
Name of Insured Persons : ..... Policy No. : .....  
Amount Insured : ..... Maturity Amount : .....  
Issued date : ..... Maturity Date : .....  
Premium Amount : ..... Nominee(s) : .....

---

Policy Name : ..... Customer Id : .....  
Name of Insured Persons : ..... Policy No. : .....  
Amount Insured : ..... Maturity Amount : .....  
Issued date : ..... Maturity Date : .....  
Premium Amount : ..... Nominee(s) : .....

---

Policy Name : ..... Customer Id : .....  
Name of Insured Persons : ..... Policy No. : .....  
Amount Insured : ..... Maturity Amount : .....  
Issued date : ..... Maturity Date : .....  
Premium Amount : ..... Nominee(s) : .....

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Policy Name : ..... Customer Id : .....  
Name of Insured Persons : ..... Policy No. : .....  
Amount Insured : ..... Maturity Amount : .....  
Issued date : ..... Maturity Date : .....  
Premium Amount : ..... Nominee(s) : .....



# Life Insurance/ Term Insurance

Policy Name : ..... Customer Id : .....  
Name of Insured Persons : ..... Policy No. : .....  
Amount Insured : ..... Maturity Amount : .....  
Issued date : ..... Maturity Date : .....  
Premium Amount : ..... Nominee(s) : .....

---

Policy Name : ..... Customer Id : .....  
Name of Insured Persons : ..... Policy No. : .....  
Amount Insured : ..... Maturity Amount : .....  
Issued date : ..... Maturity Date : .....  
Premium Amount : ..... Nominee(s) : .....

---

Policy Name : ..... Customer Id : .....  
Name of Insured Persons : ..... Policy No. : .....  
Amount Insured : ..... Maturity Amount : .....  
Issued date : ..... Maturity Date : .....  
Premium Amount : ..... Nominee(s) : .....

---

Policy Name : ..... Customer Id : .....  
Name of Insured Persons : ..... Policy No. : .....  
Amount Insured : ..... Maturity Amount : .....  
Issued date : ..... Maturity Date : .....  
Premium Amount : ..... Nominee(s) : .....

---

Policy Name : ..... Customer Id : .....  
Name of Insured Persons : ..... Policy No. : .....  
Amount Insured : ..... Maturity Amount : .....  
Issued date : ..... Maturity Date : .....  
Premium Amount : ..... Nominee(s) : .....

# Other Insurance

## MEDICLAIM POLICY

Name & Type of Policy: .....  
Customer Id : ..... Policy No./Previous Policy No. : .....  
Policy Holder Name : ..... Name of Insured Persons : .....  
Nominee(s) : .....  
Amount Insured : ..... Premium Amount : .....  
Issued date : ..... Maturity Date : .....

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Name & Type of Policy: .....  
Customer Id : ..... Policy No./Previous Policy No. : .....  
Policy Holder Name : ..... Name of Insured Persons : .....  
Nominee(s) : .....  
Amount Insured : ..... Premium Amount : .....  
Issued date : ..... Maturity Date : .....

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## FIRE / BURGLARY INSURANCE

Name of the Property : .....  
Policy No. : ..... Risks covered : .....  
Amount Insured : ..... Premium Amount : .....  
Issued date : ..... Maturity Date : .....  
Remarks : .....

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## VEHICLE POLICY

Registration No. : ..... Vehicle Model : .....  
Name & Policy No. : ..... Customer Id : .....  
Name of Insured Persons: .....  
Amount Insured: ..... Premium (Rs.): ..... Issued Date: .....  
Valid till : ..... Nominee(s): .....

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Registration No. : ..... Vehicle Model : .....  
Name & Policy No. : ..... Customer Id : .....  
Name of Insured Persons: .....  
Amount Insured: ..... Premium (Rs.): ..... Issued Date: .....  
Valid till : ..... Nominee(s): .....

# *Property*



# House Property

## PROPERTY DETAILS

Property Address & Owner's Name : .....

.....

Registration No. / Share Certificate No. : .....

Nominee(s) : .....

Loan Amount : ..... Loan Installment : .....

Bank Loan Details : ..... Property Card No. and valid up to : .....

Property Tax (Rs.) : ..... Next Due Date : .....

Insurance Policy No. : ..... Due Date : .....

Insured Amount: ..... Risk covered : .....

Documents List (Mortgage) : .....

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Property Address & Owner's Name : .....

.....

Registration No. / Share Certificate No. : .....

Nominee(s) : .....

Loan Amount : ..... Loan Installment : .....

Bank Loan Details : ..... Property Card No. and valid up to : .....

Property Tax (Rs.) : ..... Next Due Date : .....

Insurance Policy No. : ..... Due Date : .....

Insured Amount: ..... Risk covered : .....

Documents List (Mortgage) : .....

# House Property

Property Address & Owner's Name : .....

.....

Registration No. / Share Certificate No. : .....

Nominee(s) : .....

Loan Amount : ..... Loan Installment : .....

Bank Loan Details : ..... Property Card No. and valid up to : .....

Property Tax (Rs.) : ..... Next Due Date : .....

Insurance Policy No. : ..... Due Date : .....

Insured Amount: ..... Risk covered : .....

Documents List (Mortgage) : .....

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## HOUSE TAX DETAILS

Property name & Address : .....

.....

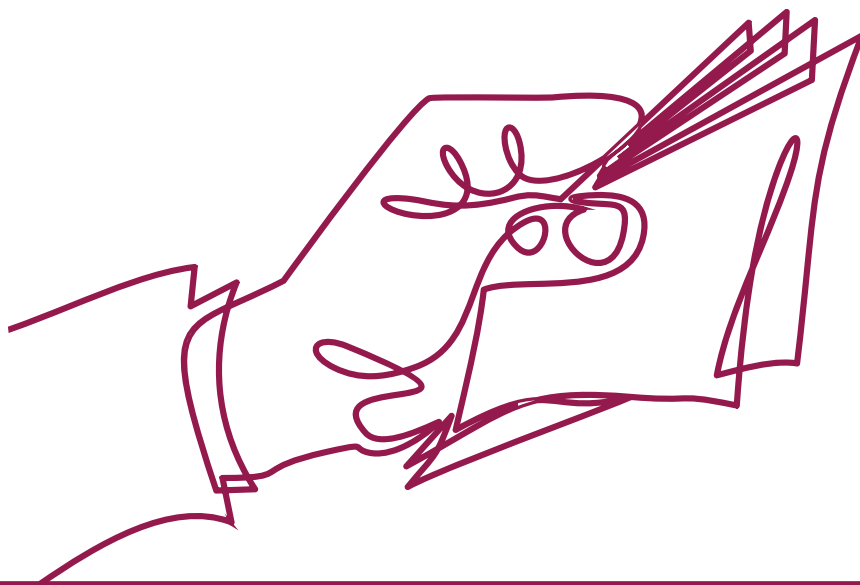
Census No. : .....

Property Identification No. (PIN) : .....

Construction Sq. Mt-rs : .....

Tax Details : .....

# *Debts/ Arrears*





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.....

.....

***With all my love,***

.....  
*Your name*





# Axis Family Book Disclaimer

*Axis Bank Family Book of Records is made available by Axis Bank for the convenience of the Customer and the same is voluntary in nature. Axis Bank Family Book of Records is shared or made available on Axis Bank website as blank PDF which may be used by the Customer to fill-in his/her personal details, at their own discretion. Axis Bank will not have access to any such personal details of the Customer and shall not maintain any repository thereof. Axis Bank shall not liable or responsible in any manner whatsoever in case of any loss/leakage/breach of Customer personal details, either directly or indirectly, during transfer or transmission of PDF file due to telecommunication network or internet or network failures, software or hardware error of any nature whatsoever. Please note, Customer is solely responsible to maintain secrecy of its personal details and Axis Bank disclaims any warranty as to the genuineness/correctness of the said information filled by the Customer in Axis Bank Family Book of Records.*