

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.

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	
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.

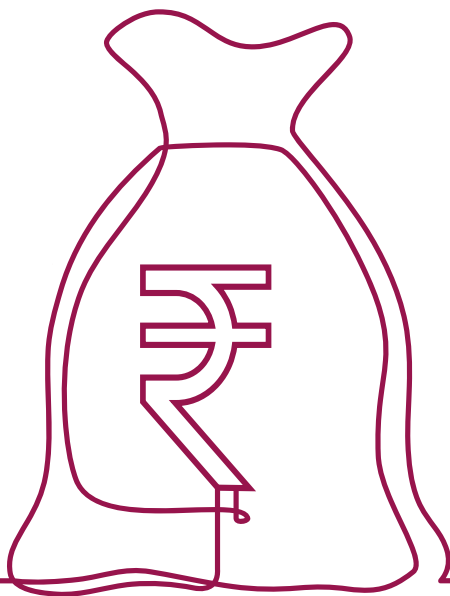
GAS PIPELINE DETAILS

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 :

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 :

Bank/Company Name : Branch :

Type of Account : Account No. :

Customer ID : Nominee(s) :

Debit Card No. : Issue Date : Expiry Date :

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:

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 :

Bank/Branch Name :

Locker no : In the Name of :

Nominee(s) :

Contents :

Bank/Branch Name :

Locker no : In the Name of :

Nominee(s) :

Contents :

PPF ACCOUNT:

Bank/Company Name :

In Favour of (Name) :

Account No. : Maturity Date. :

Nominee(s) :

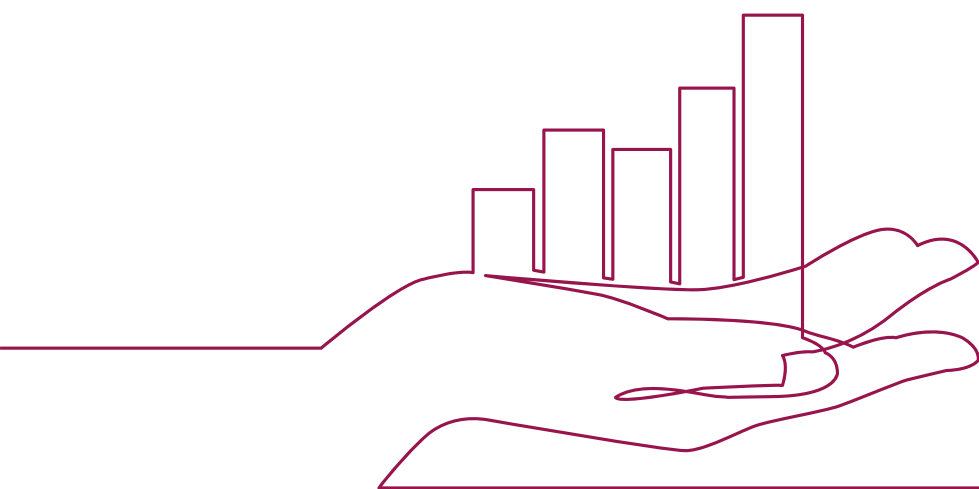
Bank/Company Name :

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

Nominee(s) :

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Bank/Company Name :

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Nominee(s) :

Operating Instructions :

Bank/Company Name :

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

Deposit No. : Amount :

Date of Deposit : Due Date :

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Nominee(s) :

Operating Instructions :

Bank/Company Name :

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

Deposit No. : Amount :

Date of Deposit : Due Date :

In Favour 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 Favour 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 :

Company : Mutual Fund name :

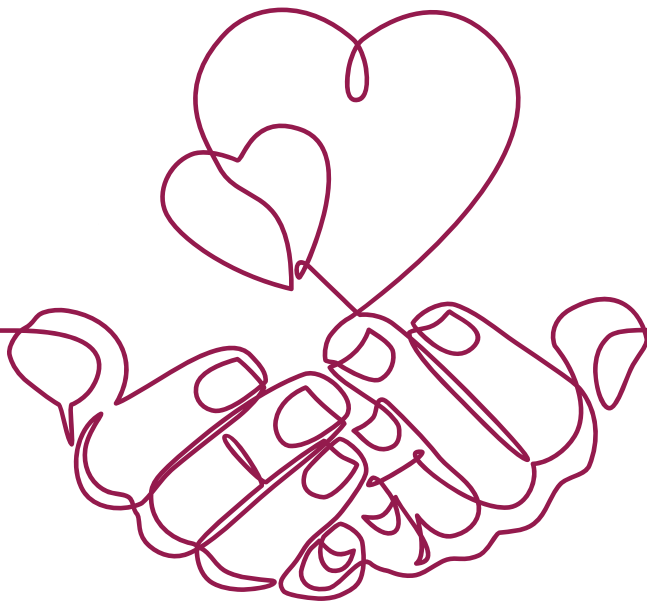
Portfolio number/ID : Plan Type :

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

Nominee(s) :

Remarks :

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) :

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) :

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 :

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 :

FIRE / BURGLARY INSURANCE

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

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):

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) :

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) :

HOUSE TAX DETAILS

Property name & Address :

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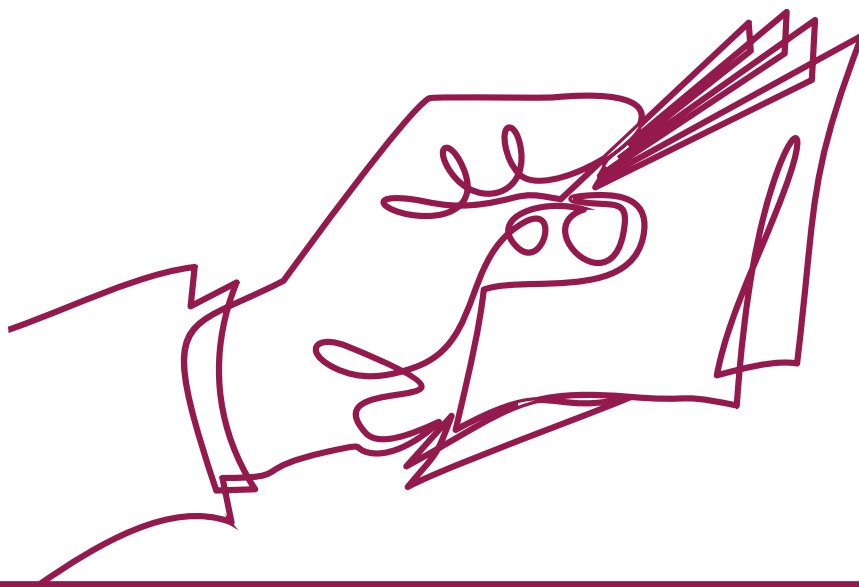
Census No. :

Property Identification No. (PIN) :

Construction Sq. Mt-rs :

Tax Details :

Debts/ Arrears



Debt/ Arrears

GUARANTOR OF:

BORROWER OF:

OTHER LIABILITIES:

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.....

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.....

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.....

.....

With all my love,

.....

Your name



Axis Bank Family Book of Records 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 be 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.