



Compliments of

Representative Babette Josephs

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Personal Estate INVENTORY



A Personal Record of Assets and Obligations

NAME

By maintaining a comprehensive record of your personal affairs, you can keep important information available for easy access. In an emergency, it is important that you, and your family, are able to take immediate action with regard to financial affairs. Also, an inventory is invaluable when death occurs.

This booklet can be as comprehensive as you deem necessary and should be updated once a year. Advise family members of this record, and where it is kept.



Rep. Babette Josephs

WHAT TO KEEP IN YOUR SAFE DEPOSIT BOX OR OTHER SAFE PLACE

What to keep permanently:

- Birth Certificate
- Will
- Marriage Record
- Social Security Card
- Paid Mortgage or Loan Contracts
- Real Estate Deeds
- Records of jointly owned property
- Other real estate papers

What to keep for 7 years:

- Savings passbook (after closed)
- Cancelled checks
- Check stubs
- Bank statements
- Receipted bills and sales slips
- Property investment records

For 10 years:

- Income tax records

While in force:

- U.S. Savings Bonds
- Warranties and instruction books

During ownership (plus 7 years):

- Stocks and bonds records

Other:

- Insurance policies (consult agency)