

Aapke Sapne
Sirf Aapke Nahi



Good People
To Bank with

Name:.....

Mobile / Phone (Self):.....

READY REFERENCE

Sr. No.	Contact	Name	Office Address	Residence Address	Mobile/ Contact Number
1	Family Doctor				
2	Financial Planner				
3	Tax Consultant				
4	Insurance Agent				
5	Stock Broker				

DOCUMENT DETAILS:

Sr. No.	Name	Number	Expiry Date
1	Passport		
2	Driving license		
3	Pan Card		
4	Aadhar Card		
5	Vehicle Document Details		
6	Credit Card		
7	ATM Card		
8	Club Membership Professional Others		

FINANCIAL AWARENESS

FINANCIAL EMPOWERMENT

Aapke Sapne

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यूनियन बैंक Union Bank of India



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LOCATION OF IMPORTANT DOCUMENTS

Sr. No.	Document	Details
1	Personal Will	
2	Spouse's Will	
3	Insurance Policies	
4	Investment Paper	
5	Property Document	
6	Birth Certificate	
7	Marriage Certificate	
8	Domicile Certificate	
9	Other Important Document	

INSURANCE - POLICY DETAILS

Sr. No.	Insurance Company	Name	Policy No.	Type of Policy	Nominee	Amount Insured	Issue Date	Maturity Date	Premium

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of India



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MEDI CLAIM POLICY DETAILS

Sr. No.	Insurance Company	Name	Nominee	Policy No.	Type of Policy	Amount Insured	Issue Date	Maturity Date	Premium
1									
2									

VEHICLE INSURANCE POLICY DETAILS

Sr. No.	Insurance Company	Name	Nominee	Policy No.	Amount Insured	Issue Date	Maturity Date	Premium	Vehicle Details
1									
2									
3									

FIRE / BURGLARY INSURANCE DETAIL

Sr. No.	Insurance Company	Name	Nominee	Policy No.	Amount Insured	Issue Date	Maturity Date	Premium
1								
2								

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NATIONAL PENSION SCHEME (NPS)

Pran No	CBO Name	CBO Rge No	Type	Balance	Nominee	Remarks / Pin

PUBLIC PROVIDENT FUND (PPF)

Bank Name & Branch	Favouring	PPF A/c. No.	Maturity Date	Nominee/s

PENSION A/C.

Bank Name & Branch	Pension A/c. No.	Operating Instructions	Pension Payment Order No.	Nominee/s	Due Date for Live Certificate

ATM / DEBIT CARD DETAILS

Sr. No.	Name	A/c. No.	Bank & Branch	ATM / Debit Card No.	Issue Date	Valid Tiu	CVV No.	PIN
1								
2								
3								
4								
5								

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CREDIT CARD DETAILS

Sr. No.	Name	Bank's Name	Credit Card No.	Valid Form	Valid Tiu	CVV No.	Remarks/ T-Pin
1							
2							
3							
4							
5							

PANCARD DETAILS

Sr. No.	Name	PANCARD No	Issue Dt.	Contact Details
1				
2				
3				
4				

PASSPORT DETAILS

Sr. No.	Name	Passport No.	Issue Dt.	Expiry Date	Issuing Authority	Previous Passport Details IF ANY

ELECTRICITY DETAILS

Sr. No.	Name	House Details	Meter No.	Customer No.	Deposit Rs.	Remarks
1						
2						

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GAS PIPE LINE DETAILS

Sr. No.	Name	House Details	Meter No/Route No	Customer No/Khata No.	Deposit Rs.	Remarks
1						

GAS CYLINDER AGENCY SERVICES DETAILS

Sr. No.	Name	House Details	Customer No.	Serial No.	Deposit Rs.	Remarks	Contact No
1							

LAND LINE DETAILS

Sr. No.	Name	House Details	Customer ID/Account No.	Phone No.	Company Name	Deposit LL/Broad Band Wi-Fi Rs	Remarks
1							

DRIVING LICENSE DETAILS

Sr. No.	Name	Driving License No	Licensing Authority	Issue Date	Valid From	Valid Till	Remarks / Blood Group
1							
2							
3							
4							

RATION CARD DETAILS

Sr. No.	Name	Ration Card No.	Issuing Authority	Issue Date	No of Member
1					
2					
3					
4					

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AADHAR CARD -DETAILS

Sr. No.	Name	Aadhar Card No.	Enrollment No.	Issue Date	Remarks
1					
2					
3					
4					

ELECTION IDENTITY CARD -DETAILS

Sr. No.	Name	Father's/Husband's Name	Identity Card No.	Issue Date
1				
2				
3				
4				

HOUSE PROPERTY

Property Detail & Standing in the name of:	How acquired (Inherited/ Loan) Bank Loan Detail : Loan Amt. Inst. Amt. O/s. Amt.	Registration No./Share Certificate No	Nominee if any	Property Card No. and valid upto	House Tax (Rs.)	Next Due Date of House Tax	Ins Policy No, Amt. & Due Date	Risk/s covered	Mortgage with Bank Name & Branch/ Place of Docs.

HOUSE TAX PROPERTY

Sr. No.	Name	House Details	Census No.	Property Identification No. (PIN)	Construction Area	Remarks
1						
2						

FINANCIAL AWARENESS

FINANCIAL EMPOWERMENT

INCOME TAX

Permanent Account No.	Ward No. and Office Address	Last Return Filed	File No.

WILL:

My will is executed on :

Copy of the will is kept at :

POWER OF ATTORNEY

- ★ Power of Attorney executed for Wife/Son/Others
- ★ My Power of Attorney is
- ★ Deed Executed on
- ★ Details kept in File No.

MY DEBT / LIABILITIES

Sr. No.	Loan Ac No.	Bank/Branch	Type Of Act	Principal Amount	ROI	EMI	EMI Due date

(a) I am guarantor of Mr/Ms

- 1.
- 2.