

Family Records Almanac

Using the Family Records Almanac can be a major step toward gaining control over the vast amount of information that is important to you and your family. The documents you can download and print can serve as the basis for organizing and storing important information and documents.

After printing the pages of the Almanac, you may want to store them in a binder for convenience. You may also wish to consider using plastic storage sleeves to hold the documents that correspond to the information you record.

After reviewing the Almanac pages, start gathering the information you want to enter and the documents you want to keep. You may also wish to get other members of your family involved in this process.

As you gather your information, you may also find that you wish to include more items such as a family tree or information on your pets.

It seems that our lives continue to get more complicated and that we are overloaded with information. Knowing what to keep and having an organized way of keeping the things that are important is not always easy.

The Family Records Almanac can make the task easier. Having your important information in a central location can help provide the peace of mind knowing that you can easily find what you need when you need it.

Table of Contents

Family Information and History

- Family Birth and Social Security Information
- Passports, Driver Licenses & Other Travel Documents
- Family History
- Family Weddings and Other Important Ceremonies
- Education and Technical and Professional Certificates
- Military Service and Separation/Divorce

Permanent Calendar

Financial Security

- Primary Accounts – Banks, Savings & Loans, Credit Unions
- Investment Relationships – Brokerage Accounts
- Investment Relationships – Mutual Fund Accounts
- Investments – Stocks & Bond
- Other Investments or Trusts
- Retirement Plan Accounts
- Places of Safekeeping

Insurance

- Life Insurance
- Property Insurance
- Health Insurance
- Vehicle Insurance

Home and Other Property

- Real Estate
- Property You Rent
- Repair People
- Vehicles
- Other Property

Other Finances

- Credit Cards
- Lines of Credit and Loans
- Accountant, Estate Planning Professional and Important Documents

Organizations and Affiliations

- Frequent Flier Information
- Other Organizations

Family Information and History

Family Weddings and Other Important Ceremonies

Family Member	Ceremony	Date	Place

Family Information and History

Education

Family Member	Degree	School	Date

Technical and Professional Certificates

Family Member	Certificate	Institution	Date

Family Information and History

Military Service

Family Member	Branch	Rank	Serial Number	Date

Separation / Divorce

Family Member	Document Title	Date

Permanent Calendar for January

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Permanent Calendar for February

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29						

Permanent Calendar for March

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Permanent Calendar for April

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Permanent Calendar for May

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Permanent Calendar for June

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Permanent Calendar for July

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Permanent Calendar for August

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Permanent Calendar for September

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Permanent Calendar for October

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Permanent Calendar for November

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Permanent Calendar for December

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Financial Security

Banks / Savings & Loan / Credit Unions

	Account 1	Account 2
Account Holder(s)		
Institution		
Account Type		
Account Number		
Contact		
Phone Number		

	Account 3	Account 4
Account Holder(s)		
Institution		
Account Type		
Account Number		
Contact		
Phone Number		

	Account 5	Account 6
Account Holder(s)		
Institution		
Account Type		
Account Number		
Contact		
Phone Number		

Family Records Almanac Compliments of

COLORADO CAPITAL

— BANK —

Financial Security

Investment Relationships – Brokerage Accounts

	Account 1	Account 2
Account Holder(s)		
Brokerage Firm		
Account Number		
Account Representative		
Phone Number		
Description of Investments		

	Account 3	Account 4
Account Holder(s)		
Brokerage Firm		
Account Number		
Account Representative		
Phone Number		
Description of Investments		

Financial Security

Investment Relationships – Mutual Fund Accounts (not at brokerage firm)

	Account 1	Account 2
Account Holder(s)		
Mutual Fund Company		
Mutual Fund Name		
Account Number		
Phone Number		

	Account 3	Account 4
Account Holder(s)		
Mutual Fund Company		
Mutual Fund Name		
Account Number		
Phone Number		

	Account 5	Account 6
Account Holder(s)		
Mutual Fund Company		
Mutual Fund Name		
Account Number		
Phone Number		

Financial Security

Investments – Stocks & Bonds (not held at brokerage firm)

	Certificate 1	Certificate 2
Securities Holder(s)		
Company or Issuer		
Number of Shares or Bonds		
Location of Certificates		

	Certificate 3	Certificate 4
Securities Holder(s)		
Company or Issuer		
Number of Shares or Bonds		
Location of Certificates		

	Certificate 5	Certificate 6
Securities Holder(s)		
Company or Issuer		
Number of Shares or Bonds		
Location of Certificates		

	Certificate 7	Certificate 8
Securities Holder(s)		
Company or Issuer		
Number of Shares or Bonds		
Location of Certificates		

Financial Security

Other Investments or Trusts (not held at brokerage firm)

	Investment 1	Investment 2
Investment Holder(s)		
Type of Investment		
Company, Issuer, Trustee		
Location of Certificates		

	Investment 3	Investment 4
Investment Holder(s)		
Type of Investment		
Company, Issuer, Trustee		
Location of Certificates		

	Investment 5	Investment 6
Investment Holder(s)		
Type of Investment		
Company, Issuer, Trustee		
Location of Certificates		

Financial Security

Retirement Plan Accounts (not otherwise included)

If a Company Plan

	Account 1	Account 2
Plan Holder(s)		
Type of Plan (401k, Keogh, Other)		
Company / Business		
Description of Investments		
Account Number		
Contact Information		

If an Individual

	Account 1	Account 2
Plan Holder(s)		
Type of Plan (IRA, Roth IRA)		
Location of Account		
Description of Investments		
Account Number		
Contact Information		

	Account 3	Account 4
Plan Holder(s)		
Type of Plan (IRA, Roth IRA)		
Location of Account		
Description of Investments		
Account Number		
Contact Information		

Financial Security

Safe Deposit Box

	Box 1	Box 2
Bank, Savings & Loan, Credit Union		
Address		
Box Number		
Persons Authorized		
Box Contents		

Family / Personal Safe

Location	
Contents	

Insurance

Life Insurance

	Policy 1
Insured Person	
Type of Policy (Term, Whole, Other)	
Life Insurance Company	
Policy Number	
Insurance Representative	
Firm	
Phone Number	
Descriptions of Policy Riders	

	Policy 2
Insured Person	
Type of Policy (Term, Whole, Other)	
Life Insurance Company	
Policy Number	
Insurance Representative	
Firm	
Phone Number	
Descriptions of Policy Riders	

	Policy 3
Insured Person	
Type of Policy (Term, Whole, Other)	
Life Insurance Company	
Policy Number	
Insurance Representative	
Firm	
Phone Number	
Descriptions of Policy Riders	

Family Records Almanac Compliments of

COLORADO CAPITAL

— BANK —

	Policy 4
Insured Person	
Type of Policy (Term, Whole, Other)	
Life Insurance Company	
Policy Number	
Insurance Representative	
Firm	
Phone Number	
Descriptions of Policy Riders	

	Policy 5
Insured Person	
Type of Policy (Term, Whole, Other)	
Life Insurance Company	
Policy Number	
Insurance Representative	
Firm	
Phone Number	
Descriptions of Policy Riders	

	Policy 6
Insured Person	
Type of Policy (Term, Whole, Other)	
Life Insurance Company	
Policy Number	
Insurance Representative	
Firm	
Phone Number	
Descriptions of Policy Riders	

Insurance

Property / Casualty Insurance – Homeowner’s / Renter’s

	Policy 1
Address Covered	
Insurance Company	
Policy Number	
Insurance Representative	
Firm	
Phone Number	
Descriptions of Policy Riders	

	Policy 2
Address Covered	
Insurance Company	
Policy Number	
Insurance Representative	
Firm	
Phone Number	
Descriptions of Policy Riders	

Umbrella Liability Insurance

Insurance Company	
Policy Number	
Insurance Representative	
Firm	
Phone Number	
Descriptions of Policy Riders	

Insurance

General Health Insurance

Family Member	
Insurance Company	
Policy Number	
Phone Number	
Organization or Company Plan	
Coverage ID Number	
Contact Phone Number	
Descriptions of Policy Riders	

Family Member	
Insurance Company	
Policy Number	
Phone Number	
Organization or Company Plan	
Coverage ID Number	
Contact Phone Number	
Descriptions of Policy Riders	

Family Member	
Insurance Company	
Policy Number	
Phone Number	
Organization or Company Plan	
Coverage ID Number	
Contact Phone Number	
Descriptions of Policy Riders	

Dental Insurance

Family Member	
Insurance Company	
Policy Number	
Phone Number	
Organization or Company Plan	
Coverage ID Number	
Contact Phone Number	
Descriptions of Policy Riders	

Family Member	
Insurance Company	
Policy Number	
Phone Number	
Organization or Company Plan	
Coverage ID Number	
Contact Phone Number	
Descriptions of Policy Riders	

Family Member	
Insurance Company	
Policy Number	
Phone Number	
Organization or Company Plan	
Coverage ID Number	
Contact Phone Number	
Descriptions of Policy Riders	

Medicare Insurance

Family Member	
Carrier	
Policy Number	
Phone Number	
Plan B Purchased?	

Supplemental Insurance

Family Member	
Carrier	
Policy Number	
Phone Number	
General Description	

Insurance

Automobile / Other Vehicle Insurance

	Vehicle 1
Vehicle Description	
Insurance Company	
Policy Number	
Insurance Representative	
Firm	
Phone Number	
Descriptions of Policy Riders	

	Policy 2
Vehicle Description	
Insurance Company	
Policy Number	
Insurance Representative	
Firm	
Phone Number	
Descriptions of Policy Riders	

	Policy 3
Vehicle Description	
Insurance Company	
Policy Number	
Insurance Representative	
Firm	
Phone Number	
Descriptions of Policy Riders	

Home and Other Property

Real Estate Owned

	Home	Vacation / Rental
Address		
Owner(s)		
Mortgage Company		
Phone Number		
Mortgage Number		
Property Tax ID #		

	Other	Other
Address		
Owner(s)		
Mortgage Company		
Phone Number		
Mortgage Number		
Property Tax ID #		

Major Improvements

Improvement Description	Date	Cost

Home and Other Property

Property You Rent

Address	
Landlord	
Landlord's Address	
Landlord's Phone #	
Emergency Phone #	

Address	
Landlord	
Landlord's Address	
Landlord's Phone #	
Emergency Phone #	

Address	
Landlord	
Landlord's Address	
Landlord's Phone #	
Emergency Phone #	

Home and Other Property

Automobiles, Bicycles and Other Vehicles

	Vehicle 1	Vehicle 2
Owner(s)		
Description (Year, Make, Model)		
Vehicle ID # (VIN)		
License Plate Number		
Lender		
Loan Number		

	Vehicle 3	Vehicle 4
Owner(s)		
Description (Year, Make, Model)		
Vehicle ID # (VIN)		
License Plate Number		
Lender		
Loan Number		

	Vehicle 5	Vehicle 6
Owner(s)		
Description (Year, Make, Model)		
Vehicle ID # (VIN)		
License Plate Number		
Lender		
Loan Number		

Other Finances

Credit / Debit / ATM Cards

	Card 1	Card 2
Card Issuer		
Type of Card (Visa, MC, etc)		
Account Number		
Issuer Phone Number		

	Card 3	Card 4
Card Issuer		
Type of Card (Visa, MC, etc)		
Account Number		
Issuer Phone Number		

	Card 5	Card 6
Card Issuer		
Type of Card (Visa, MC, etc)		
Account Number		
Issuer Phone Number		

	Card 7	Card 8
Card Issuer		
Type of Card (Visa, MC, etc)		
Account Number		
Issuer Phone Number		

	Card 9	Card 10
Card Issuer		
Type of Card (Visa, MC, etc)		
Account Number		
Issuer Phone Number		

	Card 11	Card 12
Card Issuer		
Type of Card (Visa, MC, etc)		
Account Number		
Issuer Phone Number		

Other Finances

Lines of Credit / Personal Loans

Description	
Lender	
Lender Phone Number	
Loan Number	

Description	
Lender	
Lender Phone Number	
Loan Number	

Description	
Lender	
Lender Phone Number	
Loan Number	

Personal Loans You Made to Others

Made To	
Description	
Date	
Lender	

Made To	
Description	
Date	
Lender	

Other Finances

Tax Return Preparer / Accountant Information

Name	
Firm	
Address	
Phone Number	

Estate Planning Professional

Name	
Firm	
Address	
Phone Number	

Important Documents

Document	Location
Will	
Living Will (Physician's Directive)	
Power of Attorney (Health Care)	
Power of Attorney (Finances)	
Living Trust	
Uniform Donor Card	
Partnership or Business Agreements	
Employment Contracts	
Other Employment Materials	

Organizations and Affiliations

Frequent Flier / Frequent User

Family Member	
Organization	
Account Number	
Phone Number	

Family Member	
Organization	
Account Number	
Phone Number	

Family Member	
Organization	
Account Number	
Phone Number	

Family Member	
Organization	
Account Number	
Phone Number	

Family Member	
Organization	
Account Number	
Phone Number	

Family Member	
Organization	
Account Number	
Phone Number	

Family Member	
Organization	
Account Number	
Phone Number	

Family Member	
Organization	
Account Number	
Phone Number	

Organizations and Affiliations

Other Affiliations - Unions

Family Member	
Union	
Membership Number	

Other Affiliations – Professional / Trade / Other Organizations

Family Member	
Organization	
Account/Member Number	
Phone Number	

Family Member	
Organization	
Account/Member Number	
Phone Number	

Family Member	
Organization	
Account/Member Number	
Phone Number	

Family Member	
Organization	
Account/Member Number	
Phone Number	

Family Member	
Organization	
Account/Member Number	
Phone Number	