FREE SAMPLE

MONEYVIEL · FAMILY FILE

The Family Emergency & Legacy Organiser

Everything your family would need to know, in one safe place.

- 🏦 Accounts & investments
- 🛡️ Insurance & loans
- 📁 Where every document is kept
- 📱 Digital life
- 💌 Your wishes
- ✅ A step-by-step checklist for your family

Prepared by: _____ Last updated: _____

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How to use this organiser

If something happened to you tomorrow, would your family know where your money is, which policies you have, and who to call? Many families wouldn't. Money can sit forgotten in accounts and policies simply because nobody knew it existed. This organiser fixes that in an afternoon.

1. Fill it in one section at a time. Pencil is fine: things change.

2. Keep it safe: in a home safe, a locked drawer or a bank locker.

3. Tell two trusted people where it is, for example your spouse and a sibling.

4. Review it every year and after big changes: a new job, a new policy, a move, a new child.

🔒 Golden safety rules

- **Never write** passwords, PINs, OTPs, CVV numbers or full card numbers in this organiser.
- Write only the **last 4 digits** of account, policy and ID numbers. That is enough for your family to identify them.
- Write **where** a document is kept, not the document's details.
- For passwords, use a password manager with an **emergency access** feature, and write only its name here.

This organiser is an educational tool to help you record information. It is not legal, tax or financial advice. Rules for nominations, wills and claims depend on the type of asset and on the law that applies to your family; please speak to a qualified professional for advice. MoneyViel never sees anything you write here.

A matching Excel / Google Sheets version is included if you prefer to fill it in on a computer. Keep that file password-protected or on an encrypted drive.

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SECTION 1

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About me & my family

Full name _____

Date of birth _____

Address _____

Phone _____

Email _____

Blood group _____

Medical conditions / allergies _____

Family doctor & phone _____

Hospital preference _____

Family members

Name	Relationship	Date of birth	Phone

SECTION 2

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Key contacts

The people your family should call first.

Who	Name	Phone	Email / notes

Ideas: spouse, adult children, a trusted friend, employer HR, CA / tax advisor, lawyer, insurance agent, bank relationship manager, financial adviser, landlord or tenant.

SECTION 3

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Bank accounts

Write only the **last 4 digits** of any account or policy number.

Bank & branch	Account type	Last 4 digits	Joint holder	Nominee registered? (Y/N)	Nominee name

Fixed deposits, RDs & small savings

FDs, RDs, PPF, Sukanya Samriddhi, NSC, post office schemes, Senior Citizens' Savings Scheme and others.

Scheme / bank	Last 4 digits	Amount	Maturity date	Nominee	Certificate kept at

THAT'S THE FREE SAMPLE

Get the full organiser

All 13 sections: investments, insurance, loans, property and lockers, a document locator, digital life, auto-debits, your wishes, a step-by-step checklist for your family and a yearly review, plus the Excel / Google Sheets version.

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