



Up to date personal record keeping is important for you and your loved ones, so use this brochure to get started or to refine your present record keeping.

If you would like the five basic categories on sheets you can fill out, contact the church office and ask for “The Basics for Personal Record Keeping” 6 page form.

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The Basics for Personal Record Keeping

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The key to aid you in being able to locate important information and/or documents, *easily* is to develop *your own personal record keeping system*.

Here are some tips to keep you on top of your record keeping.

1. Get organized and stay organized.
2. Set up a good filing system for your paperwork.
3. Make sure your records can be understood by anyone. Document how you keep your records, what your various records contain and where they are kept, and where you keep your back-up records.
4. Make sure your records contain enough information to meet any legal issues that may come up.
5. Get into the habit of keeping your files up to date. You may choose to do this daily, weekly or monthly but remember; the longer you wait the harder it is to catch up.

The 5 categories listed should help you get started or help with your present retrievable system. File folders, envelopes and/or boxes are the most common storage containers.

It is best to keep current year's information separated as you go.

1. EMERGENCY INFORMATION

People to Notify: Family/Next of kin/Personal Representative

2. MEDICAL INFORMATION

**Family Practitioner/Specialists
Dentist/Eye Care Provider/Other
Providers
Medical History /Immunizations/ Medi-
cation**

3. PERSONAL INFORMATION

**Employer/Business Interests:
Home Inventory:** Furniture/ Appliances/
Collectibles/Antiques/Art
Advisors: Money/Legal/ Insurance/Tax
Preparation
Personal Documents: Birth Certificate/
Passport/License, Marriage/Divorce,
etc.
Family Information: Immediate
Family (Living/Deceased/Ancestors)
Death Plans: Organ donation/
Obituary/Death Notice, Funeral/
Service details, Final-Resting Place
What You Owe/What's Owed You:
Monthly Bills/Rent/Money-Oral or
Written Agreements
Estate Planning: Will/Codicil/Trust
Documents, Executor/Personal
Representative/ Estate Planning
Attorney/Letter of Instruction, List of
Assets/Health & Durable Powers of
Attorney

4. FINANCIAL INFORMATION

**Bank/Checking/Savings Accounts:
Money Market; Certificates of Deposit/
Cash, Debit/Credit cards**

Sources of Current Income:
Employment/Pension/Trust
Funds/Rental Income/ Dividends/
Interest/Annuity, etc.
Pension/Retirement, Social Security,
Public/Private Employment, Military
Union, IRA, Keogh,401(k)/403(b)/457

Securities: Brokerage/Stocks/Corp.
Bonds/Muni-Bonds/Mutual Funds/US
Notes/Bills/Bonds, Commodities

Insurances:Life/Homeowner/Rental/
Medical/Vehicle/Disability/Annuity
All Beneficiaries

Tax Records: Current/Past Years

5. PROPERTY INFORMATION

**Real Estate:
Vehicles, Boats, Planes:**

