

# Financial Guide to BounceBack



Introducing 'Financial Guide to Bounce Back' - a ready reckoner that will become your family's financial guide and empower them further. This book will ensure that you and your family have all relevant details which will help you to bounce back from any eventuality and live life worry free.



*Sar utha ke jiyo!*

# Personal Information

Name :

Birthday:  Place of Birth:

Present Address:

Permanent Address:

Nationality:

PAN Card No:

Aadhar Card No:

Passport No:

# Bank Details

## Bank Accounts

Bank Name	Account No.	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Relationship Manager

# Assets

## Deposits

Bank Name	Locker Number	Key location
<input type="text"/>	<input type="text"/>	<input type="text"/>

## Fixed / Recurring deposits

Name of Company / Bank	Amount	Certificate No.	Location	Maturity Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Properties

Description	Type of usage	Value

Property Ownership Document/Deed Located at:

  

## Life Insurance

Insurance Company	Policy number	Amount

Agent Contact

## Other Insurance (Medical, Accident etc)

Insurance Company	Policy number	Amount

## Pension (EPFO, NPS, others)

Name of Company	Pension AC no.	Amount

## Equities/Mutual funds

Company Name	Demat AC No./Folio No.	Amount

## Loans Extended

Description	Amount

Any other

# Liabilities

Loans (Home, Vehicle, Personal etc) 

Description

Amount


## Net Worth

A. Total Assets (Total value of all savings and investments).

B. Total Liabilities

Net worth (A-B) =

Will/ Trust 

Location of will

Executioner's name and address

Additional Information 



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