

THE LEGACY BOOK

Introducing 'The Legacy Book' – A simple guide to everything you have built for your family.

This book provides them with critical financial records and vital information in one place, thus, securing their future and preserving your legacy.



Sar utha ke jiyo!

How to get started?



Why do I need this?

Life is unpredictable, but your financial wellbeing shouldn't be. The Legacy Book – A comprehensive record book that gives your family immediate clarity on all critical financial information so nothing is lost or forgotten during a crisis.

A blue spiral-bound notebook with the text "The Legacy Book" written in white cursive script on its cover. The notebook is placed on a light-colored wooden desk. To its right are a pair of brown-rimmed glasses, a black fountain pen with gold accents, and a white ceramic cup of coffee on a white coaster. A small potted plant is visible in the background on the left.

*The
Legacy Book*



How does this work?

The booklet serves as a repository for your vital financial records. It is an editable PDF that can be modified at any time; and is fully under your control. HDFC Life does not capture or store any personal details.





How can I share this with my family/nominee?

This book can be downloaded and shared with your family/nominee at any time – share it with your family in a secured manner.



*Because
your family
comes first*





How to get started?

A quick checklist before you begin.

- ✓ Keep your important financial documents handy
- ✓ Note down key accounts, assets and investments
- ✓ Review and update whenever something changes
- ✓ Share the completed book with your family

Let's get started!



Personal Information



Name

Birthday

Blood group

PAN Card
No.

Driving
license No.

Aadhar
Card No.

Passport
No.

Emergency
contact

Assets



Bank Accounts

Bank Name	Account No.	Amount	Relationship Manager

Safety Storage

Safety Locker No.		Bank		Key Location	
Safety Locker No.		Bank		Key Location	
Safety Locker No.		Bank		Key Location	

Fixed / Recurring Deposits

Name of Company/Bank	Amount	Account No./CIF	Maturity Date

Medical insurance

Insurance Company	Policy Number	Valid Up To	Sum Assured	Lives Insured

Other Insurance (Accident, etc.)

Insurance Company	Policy Number	Valid Up To	Sum Assured	Lives Insured

Pension (EPFO, NPS, others)

Name of Company	Pension A/C No.	PRAN Number	Any Other Details

Life Insurance

Policy No.

Insurance Company	Policy Inception Year	Policy Term	Premium Amount	Sum Assured/ Maturity Value	Nominee

Policy No.

Insurance Company	Policy Inception Year	Policy Term	Premium Amount	Sum Assured/ Maturity Value	Nominee

Policy No.

Insurance Company	Policy Inception Year	Policy Term	Premium Amount	Sum Assured/ Maturity Value	Nominee

Policy No.

Insurance Company	Policy Inception Year	Policy Term	Premium Amount	Sum Assured/ Maturity Value	Nominee

Demat A/C (Mutual Funds & other Investments)

Company Name	Demat AC No./ Folio No.	Broker/ RM Name	Any other details

Real Estate

Type of real estate (Plot/Apartment, etc)	Ownership type (single/joint)	Amount	Any other details

Liabilities

Loans (Home Loan, Vehicle Loan, Personal Loan, etc)

Bank	Loan number	Amount	Description	EMI

Credit card & Wallets

Card issuing bank name	Wallet Type	Any other details

Will

Location of original and copies of the will

Date of the will

M M / D D / Y Y

Points to note

- Draft your will and get it signed by two witnesses
- Visit your local Registrar's Office with your IDs and register it.

Trust Name

Date of Creation

Trustee(s)

Beneficiaries

Legal Advisor details



Important Contacts

CA/ Financial Advisor

Name

Contact No.

Lawyer

Name

Contact No.

Family Doctor

Name

Contact No.

Insurance Agent

Name

Contact No.

Stock Broker

Name

Contact No.



Employment Benefits

Current Employer

Current Employer
Address & Tel Nos.

Contact Person at
work

**Your Legacy Book is now ready to serve as
your family's trusted financial guide.**

Additional Information



(Please mention any other details)

A large, empty light blue rectangular box intended for the user to provide additional information.

Take charge of your future and plan with our insurance solutions*



Protection
Plan



Savings and
Investment Plans



Retirement
Plans

Know the brand

99.72%

Death claim
settlement ratio[#]



Recognised as a
Superbrand for the
10th time



Sar utha ke jiyo!

www.HDFCLife.com

1800 266 9777

*The above mentioned plan names are only the names of the categories of plan

[#]Individual death claim settlement ratio by number of policies as per annual audited statistics for FY 2026.

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