
Tabset: Main

This demonstration tabset contains a variety of tabs that could be used to capture information about a variety of important items. View each of the tabs to see how the RecordsKeeper can be custom tailored to help you capture information for just about anything you may want to keep a record of.

Tab: Critical Documents

This tab is used to demonstrate how information about any documents that are deemed important may be gathered. Information on how to locate and retrieve the documents, who to contact about them and what they are intended for should be included. In this case, it may also be a good idea to capture images of the documents electronically by scanning them so that a copy is available in the event of their loss, destruction or deterioration.

Type of Document:	Will	Record #: 1
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Document / Title Name: Daniel Doe
Description: Copy in Safe Deposit Box
Issue Date: Jun/2001
Expiry Date:
Purpose and Use: Need to update to change executors and to bring it up to current wishes.
Reference: Towers Trust Company
Telephone Number: (456) 465-5643
Notes and Comments: The original copy of the will is on file with our estate executor. A copy is kept in our safe deposit box. A third copy is kept in the house in the office desk drawer.
Located with: Estate Executor

Type of Document:	Power of Attorney	Record #: 2
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Document Number: Powers of Attorney file
Document / Title Name: Daniel D Doe
Description: Copy in Safe Deposit Box
Issue Date:
Expiry Date:
Purpose and Use: Power of attorney for personal care. The original copy of the will is on file with our estate executor. A copy is kept in our safe deposit box. A third copy is kept in the house in the office desk drawer.
Notes and Comments:
Located with: Estate Executor

This record contains one or more attachment files

Type of Document:	Power of Attorney	Record #: 3
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Document Number: Powers of Attorney file
Document / Title Name: Daniel D Doe
Description: Copy in Safe Deposit Box
Issue Date:
Expiry Date:
Purpose and Use: Power of attorney for personal care. The original copy of the will is on file with our estate executor. A copy is kept in our safe deposit box. A third copy is kept in the house in the office desk drawer.
Notes and Comments:
Located with: Estate Executor

This record contains one or more attachment files

Type of Document: **Power of Attorney**

Record #: 4

Document Number: Powers of Attorney file
Document / Title Name: Jane Elizabeth Doe
Description: Copy in Safe Deposit Box
Issue Date:
Expiry Date:
Purpose and Use: Power of attorney for personal care. The original copy of the will is on file with our estate executor. A copy is kept in our safe deposit box. A third copy is kept in the house in the office desk drawer.
Notes and Comments:
Located with: Estate Executor

Type of Document: **Power of Attorney**

Record #: 5

Document Number: Powers of Attorney file
Document / Title Name: Jane Elizabeth Doe
Description: Copy in Safe Deposit Box
Issue Date:
Expiry Date:
Purpose and Use: Power of attorney for personal care. The original copy of the will is on file with our estate executor. A copy is kept in our safe deposit box. A third copy is kept in the house in the office desk drawer.
Notes and Comments:

Type of Document: **passport**

Record #: 7

Document Number: WF 78 77897
Document / Title Name: Jane Elizabeth Doe
Issue Date:
Expiry Date:
Notes and Comments: Photocopy of key pages kept in safe-deposit box
Name of Location: Desk Drawer

Type of Document: **Mortgage**

Record #: 9

Document Number: hjk3455355
Document / Title Name: Daniel and Jane Doe
Description: Safe deposit box
Issue Date: Mar/1963
Expiry Date: Feb/2004
Purpose and Use:
Notes and Comments: Paid in full, currently there are no liens on the house
Name of Location: Safe Deposit Box

End of data for this tab: Critical Documents

End of data for this tabset: Main

End of data for this report