



DISTRICT GRAND LODGE OF EAST AFRICA

**WHAT MY  
FAMILY  
SHOULD KNOW**

Dear All,

This document is guidance on **“What My Family Should Know”**.

### **WHY is it Recommended?**

There have been cases of anguish and despondency when the main Family Member has passed on. The onus of preparing the necessary documents for the transfer to Next of Kin falls on the Executor/Executrix marked in the will.

Without proper documentation and location of the same, plus update of certain Government and Personal Documents on regular basis, the Executor's / Executrix's work is made difficult and it often becomes very difficult to fulfil the obligation required to regularise the status for all the necessary required transfers.

### **WHAT is Required to be done?**

Use the attached docket and start the process of updating records.

Individuals may have additional information that is not marked in the Docket which can be added accordingly.

You may seek guidance and assistance from Lawyers, Tax Consultants, Doctors, Financial Advisors, Family and Friends amongst others, to prepare this Docket.

It is recommended that information is marked separately for each individual (Husband, Spouse and Children). Joint information can be marked as such.

Data concerning assets, documents etc. would vary for each country.

A good recommendation is to update this record on an Annual or Bi-annual Basis as circumstances do and will change.

### **Conclusion**

By updating this on a regular basis, you will be able to keep track of important documents and status of your portfolio. In the event of unforeseen circumstances, the Executor/Executrix will be able to carry out the fiduciary duty with easy access to information to clear the liabilities and distribute the balance of assets to the Next of Kin.

**IT IS NEVER TOO LATE TO PREPARE!**

## What My Family Should Know

Name as per ID / Passport: \_\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Date Update: \_\_\_\_/\_\_\_\_/\_\_\_\_

Age as of Today: \_\_\_\_\_

Personal Mobile no 1: \_\_\_\_\_

Mobile no 2: \_\_\_\_\_

		Name	Office Address	Residence address as Applicable	Mobile / Contact number
<b>A</b>	<b>1. Family Doctor</b>				
	<b>2. Dentist</b>				
<b>B</b>	<b>Specialist Doctors</b>				
	1.				
	2.				
	3.				
<b>C</b>	<b>Lawyers</b>				
	1.				
	2.				
	3.				
<b>D</b>	<b>Tax Consultants</b>				
<b>E</b>	<b>Financial Advisors</b>				
<b>F</b>	<b>Investment Advisor/ Brokers</b>				
	1.				
	2.				
<b>G</b>	<b>Insurance Agent</b>				
<b>H</b>	<b>Accountants</b>				
<b>I</b>	<b>Stock Brokers</b>				
<b>J</b>	<b>Car Mechanics</b>				
<b>K</b>	<b>Maintenance Personnel's:</b>				
	Plumber				
	Electrician				

	<b>DOCUMENTS DETAILS:</b>	<b>Number or References</b>	<b>Document Expiry date As Applicable</b>	<b>Location of Documents Kept</b>
	Passport 1			
	Passport 2			
	National Identity Card or Aliens Card No:			
	Birth Certificate			
	Marriage Certificate			
	PIN Certificate			
	National Social Security No			
	National Hospital Insurance Fund			
	Driving license			
	OCI			
	Family Dependants (Legal Status of Spouse and Children who are not Kenyan Citizens)			
	Residential Property Title Deed & Details: Plot No: Location: Joint / Own			Location:
	Commercial Property Title Deed & Details: Plot No: Location: Joint / Own			Location:
	Credit / Debit ATM Cards - with which Bank  1. 2. 3.	<b>Pin no.</b>		
	<b>Personal Will</b> Executed on :	<b>Date:</b>		Copy of the Will is kept at:
	<b>Spouse's Will</b> Executed on :	<b>Date:</b>		Copy of the Will is kept at:
	<b>Children's Will</b> Executed on :	<b>Date:</b>		Copy of the Will is kept at:
	<b>POWER OF ATTORNEY</b> as applicable: Power of Attorney executed for Wife/Siblings/Others My Power of Attorney is Deed Executed on:	<b>Date:</b>  <b>Ref No:</b>		Location:

	<b>Blood Group:</b>			
	<b>Vehicle Details</b>			
	Vehicle ONE Registration No: Log Book No: Vehicle Insurance Policy Details No: Amount Insured:		Ins Issued Date:  Ins Expiry Date:	Location of Log Book:
	Vehicle TWO Registration No: Log Book No: Vehicle Insurance Policy Details No: Amount Insured:		Ins Issued Date:  Ins Expiry Date:	Location of Log Book:
	<b>Income Tax Return File No.</b>	<b>Last Filed date:</b>		
	Important Agreements: 1. 2. 3.			<b>Remarks:</b>
	Investment Papers 1. 2. 3.			<b>Remarks:</b>
	Other Important Papers: 1. 2. 3.			<b>Remarks:</b>
	<b>SHARES/UNITS/DEBENTURES/BONDS:</b> Standing in own name or Jointly with: Company Name: Share Holding:			
	Club Memberships: 1. 2. 3.	<b>Membership no's:</b>	<b>Annual Subscriptions</b>	<b>Annual Subscriptions Due Date:</b>
	Court Cases if Any:			<b>Remarks:</b>
	Insurance Cases if Any:			<b>Remarks:</b>
	Monies Given out on Loan:	<b>Amounts:</b>		<b>Remarks:</b>

<b>BANK ACCOUNTS:</b>					
<b>Bank Name</b>	<b>Branch</b>	<b>Type of Accounts</b>	<b>Account NO:</b>	<b>Amounts:</b>	<b>Operating Instructions</b>
		<b>Current</b>			
		<b>Savings</b>			
		<b>Fixed Deposits</b>			<b>Maturing:</b>

<b>Bank LOCKERS:</b>	Account No:	Rent Payable:
Bank Name & Branch In the Name of:	Locker No:	Rent Renewal Date:

	<b>Various Policies:</b>	<b>Amount</b>	<b>Annual Premiums</b>	<b>Premium Dates</b>
	<b>Life Insurance Policy Details</b> Issuing Company: Brokers: Policy Type & No: Issued in the name of:	Amount Insured:  Beneficiaries:	Term:  Premium Amount/Remarks:	Issue Date:  Maturity Date:
	<b>Medical Insurance Policy:</b> Issuing Company: Brokers: Policy Type & No: Issued in the name of:	Amount Insured:	Premium Amount/Remarks:	Issue Date:  Renewal Date:
	<b>Travel Insurance Policy:</b> Issuing Company: Brokers: Policy Type & No: Issued in the name of:	Amount Insured:	Premium Amount/Remarks:	Issue Date:  Renewal Date:
	<b>FIRE / BURGLARY INSURANCE :</b> Issuing Company: Brokers: Name of the Property / Nominee: Policy Type & No: Issued in the name of: Risks covered:	Amount Insured:	Premium Amount/Remarks:	Issue Date:  Renewal Date:
	<b>ANY OTHER INSURANCES:</b>			

Other DEPOSITS	Notes:	AMOUNT:
Mobile Company:	Mobile no:	
Electricity Details:	Meter No:	
Water Details:	Meter No:	
Clubs	Membership Nos:	
Petrol Station:		
Others:		

<b>RESIDENTIAL / COMMERCIAL Property:</b>	
Property Detail & standing in the name of:	
Title Deed No: If Company: Registration No. / Share Certificate No.	
How acquired (Inherited / Purchase)	
Bank Loans Detail: Loan Amt. Inst. Amt. O/s. Amt.	
Ins. Policy No., Mortgage with Bank Name & Branch / Place of Docs.	Amount Insured: Due Date: Risk/s covered:
Any Other details related to the Property:	

I am a Personal <b>Guarantor</b> of: (Give complete details): 1. 2. 3.
I have Personally <b>Borrowed</b> from: (Give complete details) 1. 2. 3.
<b>Other Assets / Liabilities:</b>      

<b>Additional Information:</b>     
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<b>Additional Wishes</b> (besides the Will) in an event of unforeseen circumstances:   
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**Note:**

- The above is for Guidance Only
- You may seek advice and assistance from Lawyers, Tax Consultants, Doctors, Financial Advisors, Family and Friends amongst others
- Individuals may have additional information that is not marked above and would need to be updated accordingly
- Other Countries assets, documents etc. information details would vary
- A good Guidance is to update this record on an annual or bi-annual Basis as circumstances do change
- By way of doing this update, you will be able to keep track of important documents and storage
- To prepare Separate for each Family Member
- It is very Important that Names of each Individual ID and Passport should correspond in spelling!