
Items at Location: **Safe Deposit Box**

Location Detail:

Name of Location: (Safe Deposit Box)

Contact: (Charles Gartlan)

Address: (Main and Main Boulevards

Anytown

Anystate, Anywhere)

Contact Numbers: (Phone: (800) 187-1778)

E-Mail Address: (mailto:MGartlan@thebank.com#mailto:MGartlan@thebank.com#)

Website Address: ()

Notes and Comments:

The safe deposit box is in Jane's Name. The box account number is **87-443-3987**. Keys are kept in the bottom left hand desk drawer.

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: Insurance Policies

This tab is used as an example of how to capture information about any type of insurance policy that may be in effect. This could include insurance for life, accident, loan protection, automobile or other pleasure craft, home, liability and so on.

Type of Policy:	Home Owners	Record #: 1
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Policy Number: Agg5138665

Insuring Company Dominion of the World General Ins.

Name:

Name on Policy / Daniel D Doe and Jane E Doe

Insured:

Issue Date:

Expiry Date:

Institution Web-site: <http://www.insureme.com/home-insurance-quotes.html#http://www.insureme.com/home-insurance-quotes.html#> (Go to web-site)

Images / [DummyHyperlink.txt](#)

Documentation:

Beneficiaries / Purpose: Premiums automatically debited to chequing account monthly.

Full policy in file (desk) under 'Insurance - House'

Reference: 222 University Avenue, Anytown

Telephone Number: (800) 661-5456

Notes and Comments: Agent: The Majestic Group Inc.

15 Lovely Road, Suite 100

Anytown

905-845-9546

Type of Policy:	Auto	Record #: 2
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Policy Number: C 77434

Insuring Company Automobile Ass.

Type of Policy: **Auto** **Record #: 2**

Name:
Name on Policy / Jane Doe
Insured:
Issue Date:
Expiry Date:
Institution Web-site: [#http://www.caa.ca/home-e.cfm#](http://www.caa.ca/home-e.cfm#) (Go to web-site)
Images / [Camry.jpg](#)
Documentation:
Beneficiaries / Purpose:
Reference: 73 Commerce Valley Lane, Anytown
Telephone Number: (905) 561-5617
Notes and Comments: 1-877-567-1717

Claims: 905-57-3007 or 1-800-567-2656

Premiums are paid monthly via automatic debit to the chequing account.
Documents: [DummyHyperlink.txt](#) Page 1 of insurance policy
 [DummyHyperlink.txt](#) Page 2 of insurance policy

Type of Policy: **Life** **Record #: 6**

Policy Number: LI-6456,271-4
Insuring Company My Life Assurance Company
Name:
Name on Policy / Jane E Doe
Insured:
Issue Date:
Expiry Date:
Institution Web-site: [#http://www.metlife.com/campaign/search/life-insurance/index.html?WT.srch=1&WT.mc_id=cs000055&pagefrom=MLPS_life-insurance#](http://www.metlife.com/campaign/search/life-insurance/index.html?WT.srch=1&WT.mc_id=cs000055&pagefrom=MLPS_life-insurance#) (Go to web-site)
Images / [DummyHyperlink.txt](#)
Documentation:
Beneficiaries / Purpose: Life insurance
Contact: Ben Ticklme, extension 249
Reference: My Life, PO Box 16w1 Stn Waterloo, Anytown
Telephone Number: (905) 276-7456
Notes and Comments: Customer Service Center 1-888-845-5445

Premium billed annually and paid by cheque
Amount: 100,000.00 Life insurance benefit
Amount: 500,000.00 Accidental death benefit

Type of Policy: **Accident** **Record #: 10**

Policy Number: 6345-88
Insuring Company Westbury Life
Name:
Name on Policy / Daniel Doe
Insured:
Other Information: Accidental Death and Dismemberment
Issue Date:
Expiry Date:
Institution Web-site: <http://www.insurancesavequotes.com/index.php?t=life&t202id=3695&t202kw=&OVRAW=westbury%20lif>

