

Nominee Central

Book of Important Things

The ultimate planner you will ever need to safeguard your legacy.



Index

What your nominee needs to know

About Book of Important Things	01
FAQs	02
Life Insurance & Health Insurance	03
General Insurance & Bank Details	04
Loan Details & Investments - MFs & Stocks	05
Fixed Deposit	06
Stocks	07
Crypto	08
Real Estate & Automobiles, Motorcycles, Boats, RVs, and other vehicles.....	09
Other Important Financial Information	10-24

Click on a page number to jump directly to that page



The Book of Important Things is a downloadable, editable & shareable document from Nominee Central by IndiaFirst Life.

It is a simple yet powerful reminder to consolidate, write and share essential information about your investments and insurance policies with your Nominee.

This thoughtfully designed book addresses a crucial reality: in many cases, nominees remain unaware of the policies & investments meant to safeguard their future. This silence can lead to missed claims and financial uncertainty for your loved ones.

By filling out this book with your investment and insurance details, you are creating a roadmap for your nominee; making it easier for them to access the benefits you've worked hard to secure for them over time. But this is just the first step.

Once you have recorded all your information, take a moment to sit down with your nominee and discuss these details. Explain how each policy or investment works, where to find the documents, and the steps they need to take if they ever need to make a claim.

This conversation is an act of love, ensuring that your legacy serves its purpose when it's needed the most.

We hope you find this book helpful in building your future with certainty.



Your Financial Checklist



To begin, watch this video for a step-by-step guide to make the most of this book.

Remember to take your time with appointing a nominee and secure the financial stability & peace of mind of your family.

Refer to our FAQs for guidance while filling out your details

How secure is my information within this book?

This unique, downloadable and editable book helps you maintain and update your investment records anytime. Since it's stored on your device, you have full control. IndiaFirst Life does not capture or store any personal details. You can edit and share it with your family as needed.

How can I share this book with my Nominee?

This interactive book can be downloaded and shared with your Nominee at any time - simply share over WhatsApp, Email, or print and store safely after informing your Nominee.

Can I change my nominee later?

Yes, updating nominee details is essential as life circumstances change.

Who should be my Nominee?

Your nominee should be someone you trust completely - your spouse, children, or another close family member who will ensure your wishes are honored. In case of minor children, make sure to appoint a legal guardian so there are no unnecessary issues in the future.

What happens if I don't update my nominee details?

Outdated information can lead to disputes, legal hassles, and delays in transferring assets to your loved ones. Keeping details updated ensures a hassle-free transition.

Life Insurance Details

Sr. No	Policy Name	Policy Number	Life Cover	Premium Amount	Premium Paying Term	Policy Start Date	Renewal Date	Maturity Date	Life Insurer	Nominee	Other Details

Health Insurance Details

Sr No.	Policy Name	Policy Number	Health Cover	Premium Amount	Premium Paying Term	No- Claim Bonus	Policy Start Date	Renewal Date	Maturity Date	Company Name	Nominee	Other Details

Include Group or employee-provided health insurance, if applicable

General Insurance Details

Sr No.	Policy Name	Policy Number	Coverage Amount	Premium Amount	Premium Paying Term	No- Claim Bonus	Policy Start Date	Renewal Date	Maturity Date	Company Name	Nominee	Other Details

Bank Account Details

Sr No.	Bank Name	Branch Name	Account No.	Account Type	Acc. Holder's Name	Nominee	Purpose	IFSC Code	Locker Details	Other Details

Loan Details

Date	Loan Type	Bank	Amount	Interest	EMI	Tenure	Nominee	Acc. No.	Other Details

Investments (Mutual Funds, Bonds, PPF)

Date	Investment	Invested Amount	Instrument	Time period	Maturity Value	Maturity Date	Nominee	Other Details

Fixed Deposit (FD) & Recurring Deposit (RD)

[illegible]

Stocks

[illegible]

Crypto

[illegible]

Real Estate

Sr No.	Name	Address	Owner Name/s	Type (Apt/Plot/ Villa/ Commercial)	Ownership Document Storage Details (Sale Deed etc)	Type of Ownership (Joint/Single)	Loan details (If any)	Rent/Lease Details (If any)	Other Details

Automobiles, Motorcycles, Boats, RVs, and other vehicles

Sr No.	Type	Model & Colour	Date of Purchase	VIN	Owner Details	License Plate No.	Loan Details (if any)	Auto Insurance	Other Details

Other Important Financial Information

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. At the top of the page, there is a decorative border featuring a light blue and white pattern, possibly representing clouds or water. The overall appearance is that of a clean, unused piece of stationery.

Other Important Financial Information

[illegible]

Other Important Financial Information

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. At the top of the page, there is a decorative border featuring a blue and white patterned design. The rest of the page is plain white.

Other Important Financial Information

[illegible]

Other Important Financial Information

[illegible]

Other Important Financial Information

[illegible]

Other Important Financial Information

[illegible]

Other Important Financial Information

[illegible]

Other Important Financial Information

[illegible]

Other Important Financial Information

[illegible]

Other Important Financial Information

[illegible]

Other Important Financial Information

[illegible]

Other Important Financial Information

[illegible]

Other Important Financial Information

[illegible]

Other Important Financial Information

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. At the very top, there is a decorative border featuring a light blue background with white, cloud-like or floral patterns. The rest of the page is plain white, providing ample space for writing.