The Fishing-Dependent Families Project
Family and Business Records Checklist for Fishing Families

When a family member is either the owner of a fishing boat or a member of the crew, there is always the risk of injury or death, or the loss of the vessel at sea. This publication is intended to help you gather essential information about your family and the vessel. In case of an emergency this information will help family members deal with post-casualty demands.

Name__________________________
Address________________________

Date prepared____________________
Dates of revisions________________

Prepared by Ginny Golbrich, marine agent, and Alice Mills Morrow.
Extension family economics specialist, Oregon State University. Much of the material in this publication was adapted from Extension publication EC 1234, *Do You Know Your Valuable Papers?* by Alice Mills Morrow.
Handling a Crisis

When a crisis occurs, there are numerous issues to deal with at a time when you are least able to cope. Don’t hesitate to ask for, and accept, help from rational, clear-thinking friends or professionals.

During a search and rescue operation, keep yourself as informed as possible. Keep communication lines open among all involved. If you want to go to the Coast Guard station, go. Ask other fishermen questions, such as the areas where the vessel might have been fishing. Remember the owner’s family is upset as you are. Don’t listen to rumors, which will run rampant and may needlessly add to your stress.

When there is media coverage of an accident, discuss what you should or should not say to reporters with your insurance agent or attorney. It may be best to refer the media to your attorney.

You don’t automatically need an attorney. However, you should get legal advice before accepting or signing agreements or settlements. It is a good idea to know of some competent marine attorneys in case the need arises. The attorney should be familiar with the Jones Act and the Death on High Seas Act. The attorney should also be familiar with federal and state court litigation. You may get ideas about who you might call upon from your family attorney or from fellow fishermen.
## Boat Records: Boat Owner

<table>
<thead>
<tr>
<th>Record</th>
<th>Location</th>
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</thead>
<tbody>
<tr>
<td>Last survey of the vessel</td>
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<tr>
<td>Sketch of the vessel locating all interior spaces such as engine room, fo’c’s’le, etc. (If available, a blueprint is ideal.)</td>
<td></td>
</tr>
<tr>
<td>List of and receipts for all safety, navigation, and other equipment placed on board since the last survey.</td>
<td></td>
</tr>
<tr>
<td>Record of vessel modifications completed since last survey.</td>
<td></td>
</tr>
<tr>
<td>Record of last Coast Guard safety inspection.</td>
<td></td>
</tr>
<tr>
<td>Record of all safety training programs participated in by the skipper and/or crew.</td>
<td></td>
</tr>
<tr>
<td>Records/receipts for safety, navigation, and other equipment maintenance and repairs. (Write on receipts the work done and by whom.)</td>
<td></td>
</tr>
<tr>
<td>Records of maintenance work done the last time vessel was drydocked.</td>
<td></td>
</tr>
<tr>
<td>Float plan and communication schedule for each trip.</td>
<td></td>
</tr>
<tr>
<td>Radio call sign, VHF channel, and SSB channel vessel stands by on. Vessel cell phone number, if applicable.</td>
<td></td>
</tr>
<tr>
<td>For all people on board, the location of names, phone numbers, and people to contact in emergency.</td>
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</tr>
<tr>
<td>Name, address, and phone number of marine insurance agent.</td>
<td></td>
</tr>
<tr>
<td>Amount of vessel insurance.</td>
<td></td>
</tr>
<tr>
<td>Limits of vessel’s hull and P &amp; I insurance.</td>
<td></td>
</tr>
</tbody>
</table>
**Boat Records: Crew Member**

<table>
<thead>
<tr>
<th>Record</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name and phone number of skipper</td>
<td></td>
</tr>
<tr>
<td>Name and phone number of owner</td>
<td></td>
</tr>
<tr>
<td>Names and phone numbers of people to contact in an emergency</td>
<td></td>
</tr>
</tbody>
</table>

*When family members are away from home port, establish a regular communication schedule if possible. Have a contact phone number on file—the owner, the fish plant, other fishermen. Make note of the time and date the vessel is due in port.*
**Family Members**
List all family members including children married and/or living away from home. You may wish to add such information as health conditions, membership in organizations, etc., that would be useful in cases of emergency.

<table>
<thead>
<tr>
<th>Name</th>
<th>Date of Birth</th>
<th>Where Birth is Recorded</th>
<th>Comments</th>
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</thead>
<tbody>
<tr>
<td>Husband</td>
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<tr>
<td>Wife</td>
<td></td>
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<tr>
<td>Children/Addresses/Phone</td>
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</tbody>
</table>

**Close Relatives/Friends**
List those persons to be notified when serious emergencies occur.

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<thead>
<tr>
<th>Name</th>
<th>Address • Phone Number</th>
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</table>

**Power of Attorney**
If you have given someone the written legal power to act for you in case you become unable to handle your own financial affairs, indicate below.

<table>
<thead>
<tr>
<th>Name</th>
<th>Address • Phone Number</th>
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</tbody>
</table>

**Family Advisers**
Write names and addresses of any advisers you depend on in your personal and business affairs.

<table>
<thead>
<tr>
<th>Name</th>
<th>Address • Phone Number</th>
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<tbody>
<tr>
<td>Clergy</td>
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<tr>
<td>Doctor</td>
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<tr>
<td>Accountant</td>
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<td>Banker</td>
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<td>Broker</td>
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<td>Insurance agents</td>
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<tr>
<td>Lawyer</td>
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<tr>
<td>Other:</td>
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</tbody>
</table>
## Location of Personal Papers

Being able to find your valuable papers quickly is important to you or your survivors. Under Location, clearly identify the specific desk and drawer, closet, box, etc.

<table>
<thead>
<tr>
<th>Papers</th>
<th>Location</th>
<th>Papers</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wills and Instructions</td>
<td>Personal Property Papers</td>
<td>Husband’s will</td>
<td>Checkbooks</td>
</tr>
<tr>
<td>Wife’s will</td>
<td>Savings passbooks and certificates</td>
<td>Copies of wills</td>
<td>Insurance (life, health, accident)</td>
</tr>
<tr>
<td>Funeral directions—cremation, burial</td>
<td>Stock certificates</td>
<td>Special letters of instruction</td>
<td>Savings bonds</td>
</tr>
<tr>
<td>Power of attorney</td>
<td>Safe deposit box and key</td>
<td>Personal Papers</td>
<td>Canceled checks and stubs</td>
</tr>
<tr>
<td>Baptismal certificates</td>
<td>Automobile title</td>
<td>Birth certificates</td>
<td>Inventory of household goods</td>
</tr>
<tr>
<td>Marriage certificates</td>
<td>Registrations—auto, dog, etc.</td>
<td>Adoption certificates</td>
<td>Guarantees on appliances</td>
</tr>
<tr>
<td>Divorce certificates</td>
<td>Appliance instruction books</td>
<td>Death certificates</td>
<td>Credit cards (List them)</td>
</tr>
<tr>
<td>Naturalization papers</td>
<td></td>
<td>Diplomas</td>
<td>Real Estate Papers</td>
</tr>
<tr>
<td>Passports</td>
<td>Deed to your house</td>
<td>Social Security cards</td>
<td>Deed to other real estate</td>
</tr>
<tr>
<td>Employment records</td>
<td>Record of improvements</td>
<td>Armed Forces records</td>
<td>Mortgage papers</td>
</tr>
<tr>
<td>Family health records</td>
<td>Mortgage payment receipts</td>
<td>Directive for Health Care/Living Will</td>
<td>Insurance policies</td>
</tr>
</tbody>
</table>
**Financial Services**
List services you are using.

<table>
<thead>
<tr>
<th>Name and Address of Financial Firm</th>
<th>Identification Number</th>
<th>In Whose Name(s)</th>
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<tbody>
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<td>Checking accounts:</td>
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<td>Savings accounts:</td>
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<td>Certificates of deposit:</td>
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<td>Money market certificates:</td>
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<td>Trust accounts:</td>
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<td>Safe-deposit box:</td>
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<td>Other services (incl. financial planner):</td>
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</table>

**Real Estate and Business Interests**
List real property and business interests owned by the family. Also include mortgages held. Kind of Ownership refers to tenancy in common or joint tenancy, partnership, etc.

<table>
<thead>
<tr>
<th>Kind of Property</th>
<th>Location (address)</th>
<th>Name(s) of Owner(s)</th>
<th>Kind of Ownership</th>
<th>Date Acquired</th>
<th>Purchase Price</th>
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</table>
**Stocks, Bonds, and Securities**

List any United States Savings Bonds, Treasury securities, government agency securities, corporate and government stock certificates, and other securities you own.

<table>
<thead>
<tr>
<th>Name of Asset</th>
<th>Serial Number</th>
<th>Date Purchased</th>
<th>Purchase Price</th>
<th>Other Useful Information (name of owner, no. of shares, maturity date)</th>
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</table>

**Mutual Funds**

List any mutual funds and money market funds you own.

<table>
<thead>
<tr>
<th>Company Name and Fund Type</th>
<th>Identification Number</th>
<th>Date Acquired</th>
<th>Original Amount</th>
<th>Other Useful Information (name of owner, no. of shares, maturity date)</th>
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</table>
**Other Personal Property**

List autos, recreation equipment, mobile home, and other items of value (jewelry, antiques, books, collections, royalties, patents, etc.).

<table>
<thead>
<tr>
<th>Name of Asset</th>
<th>Date Acquired</th>
<th>Purchase Price or Value</th>
<th>Other Useful Information (name of owner, no. of shares, maturity date)</th>
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</tbody>
</table>

**Property Insurance**

In this section, list your insurance policies.

<table>
<thead>
<tr>
<th>Description of Property Insured</th>
<th>Kind of Risk Insured</th>
<th>Amount of Coverage</th>
<th>Policy Number</th>
<th>Name of Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real estate:</td>
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<tr>
<td>Automobiles:</td>
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<td>Other personal property:</td>
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<tr>
<td>Personal liability:</td>
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<tr>
<td>Other:</td>
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</tbody>
</table>
**Life Insurance and Annuities**

List all life insurance policies and annuities carried on family members. Indicate kind of policy such as term, whole life, endowment, family income, etc. If owner of policy is not the person insured, give both names.

<table>
<thead>
<tr>
<th>Person Insured</th>
<th>Kind of Policy</th>
<th>Face Value</th>
<th>Policy Number</th>
<th>Beneficiary</th>
<th>Name of Company</th>
</tr>
</thead>
<tbody>
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</table>

**Health Insurance—Accident, Disability, Hospital**

Include Blue Cross, Blue Shield, Major Medical, other employers' insurance, Medicare, and/or individual policies on family members.

<table>
<thead>
<tr>
<th>Person(s) Insured</th>
<th>Kind of Policy</th>
<th>Amount of Coverage</th>
<th>Policy Number</th>
<th>Name of Group or Company Providing Insurance</th>
</tr>
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<tbody>
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10
Social Security, Retirement, and Employment

Information concerning these items is often needed in filing applications, checking records, settling estates, etc.

<table>
<thead>
<tr>
<th>Social Security</th>
<th>Employment Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Insured</td>
<td>Social Security Number</td>
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</table>

Retirement, Pension, or Profit-Sharing Plan

<table>
<thead>
<tr>
<th>Person in System</th>
<th>Name of System</th>
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</table>

Money Owed

This list can help you realize how much of your future income or other assets you have promised to others. It would be extremely valuable to those who handle your financial affairs.

<table>
<thead>
<tr>
<th>Person or Company Owed</th>
<th>Address</th>
<th>Size of Original Debt</th>
<th>Terms of Payment</th>
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<tbody>
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</table>
The OSU Fishing Dependent Families Project, funded by the Extension Sea Grant Program and the Oregon State University Extension Service, covers the entire Oregon coastline. For more information contact your fishing family coordinator or OSU Extension Sea Grant agent:

- On the North Coast: Dyan Hartill, 325-7372, or Jim Bergeron, 325-8027.
- On the Central Coast: Connie Kennedy, 574-0882, or Ginny Goblirsch, 265-3463, or R.C. Hinman, 271-3568.
- On the South Coast: Linda Brown, 469-8890, or Jim Waldfogel, (707) 464-4711.

Other publications from the OSU Fishing-Dependent Families Project include:

- The Fishing Family and Business Resource Kit
- Helping Persons Cope with Change, Crisis, and Loss
- Tax Information for Crewmen on Commercial Fishing Boats
- Getting Unhooked from Anger and Conflict

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Oregon Sea Grant
Oregon State University