

My Financial Inventory: _____ **Date:** _____

Financial Assets and Loans	Account Number	Company & Contact Information (name, phone, e-mail)
Bank account(s) Checking Savings Other		
Credit Union account(s)		
Investment (stocks, bonds) account(s)		
Mutual fund account(s)		
Retirement account(s), such as 401(k), 403(b), IRA, or annuity		
Pensions		
Mortgage		



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Credit card(s)		
Personal loans (car, other)		
Student loan		
Health insurance/Health savings accounts		
Homeowner's insurance		
Car insurance		
Life insurance		
Long-term care insurance		
Social Security		

My Financial Inventory

Important Documents and Paperwork	Location/Where I Keep It	Other Information, including when last updated
Property paperwork, such as house deed or car title		
Safe deposit box	Institution: Box #: Where I keep the key:	Contents: Authorized signers:
Military paperwork, if applicable		
<u>Durable power of attorney</u> (for financial decisions)		
<u>Medical durable power of attorney</u>		
<u>Living Will</u>		
<u>Last will and testament</u>		
<u>Beneficiary designations for retirement accounts</u>		

My Financial Inventory

Key Contacts	Contact Name and Company, if applicable	Phone Number, E-mail, Mailing Address
Employer		
Accountant/Financial advisor		
Physician(s)		
Lawyer		
Clergy		
Family		
Friends		