

Checklist: Financial Accounts & Assets

Getting Started

Don't let disorganization become one of your biggest money problems.

This checklist includes the following:

- Important Financial Contacts
- Financial Accounts & Investments
- Credit Cards
- Tax Returns
- Property: Owned & Rented
- Vehicles
- Loans
- Safe Deposit Box
- Misc. Valuables

Remember

[Create an Everplan](#) to easily and securely update and share this vital info with the people you love and trust.

Important Contacts

- Accountant Name/Info: _____
- Financial Advisor Name/Info: _____
- Lawyer Name/Info: _____
- Other Name/Info: _____

BANK ACCOUNTS

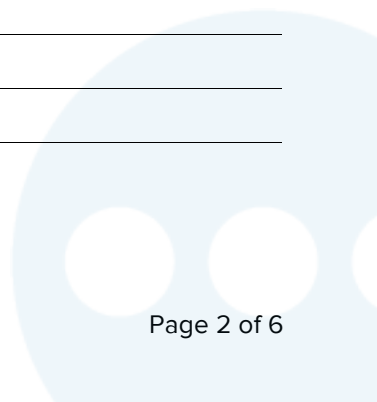
Have a recent account statement for each, location of related items (example: checkbooks, passbooks), and login information for online management.

- Checking Bank: _____ Last 4 Digits: _____
- Savings Bank: _____ Last 4 Digits: _____
- ATM/Debit Bank: _____ Last 4 Digits: _____
- Other:

INVESTMENTS / PENSIONS / BENEFITS

Have a recent statement for each account, as well as login information for online management.

- Stocks Bonds
- Mutual Funds Military Benefits
- 401(k) 403(b)
- IRA Roth IRA
- Pension (SEP / SARSEP) 529/College Savings
- Other (Example: Trust Fund, Business Interests/Stock Options):



CREDIT CARDS

Have a recent statement for each card, as well as login information for online management. You can list any rewards you receive for using the card next to "Benefits."

American Express:

Last 4 Digits: _____ Exp. Date: _____ Benefits: _____

Discover

Last 4 Digits: _____ Exp. Date: _____ Benefits: _____

Mastercard

Last 4 Digits: _____ Exp. Date: _____ Benefits: _____

Visa

Last 4 Digits: _____ Exp. Date: _____ Benefits: _____

Other:

Write the name of the store-based credit card (Example: Target, Exxon, Wal-Mart, etc.); have a recent statement for each and the login information for online management.

Store: _____

Last 4 Digits: _____ Exp. Date: _____ Benefits: _____

Store: _____

Last 4 Digits: _____ Exp. Date: _____ Benefits: _____

Store: _____

Last 4 Digits: _____ Exp. Date: _____ Benefits: _____

Store: _____

Last 4 Digits: _____ Exp. Date: _____ Benefits: _____

Other:



TAX RETURNS

These are the ideal financial blueprints for people in your life to understand your estate.

Location Of Recent Tax Returns: _____

Tax Prep (circle one): Accountant | Software/Online Service

Name Of Accountant or Service: _____

Contact or Login Info: _____

Additional Info:

PROPERTY: OWNED

Address: _____

Location of Deed: _____

Location of Mortgage Paperwork: _____

Mortgage Company Name/Contact Info: _____

Account Number (if applicable): _____

Additional Info:

PROPERTY: RENTED

Address: _____

Location of Lease: _____

Landlord Contact Info: _____

Monthly Rent: _____ Security Deposit: _____ Lease End Date: _____

Additional Info:

VEHICLES

Vehicle Type: _____

Ownership Status (circle one): Owned (Financed) | Leased | Owned & Paid Off

Location of Title/Lease: _____

Finance Company (if applicable): _____

Additional Info: _____

Vehicle Type: _____

Ownership Status (circle one): Owned (Financed) | Leased | Owned & Paid Off

Location of Title/Lease: _____

Finance Company (if applicable): _____

Additional Info: _____

LOANS

Keep track of the following info and once the loan is paid off feel free to mark it "PAID" and celebrate.

Type Of Loan (circle one): Line of Credit | Personal Loan | Student Loan | Other

Name Of Financial Institution: _____

Account Number: _____

Location of Related Documents: _____

Additional Details & Instructions:

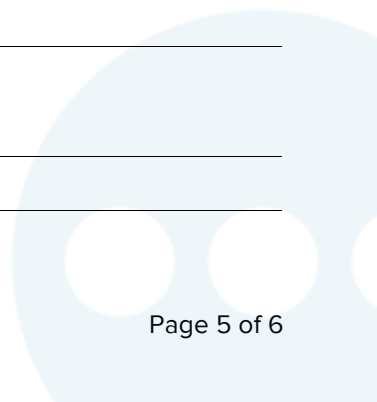
Type Of Loan (circle one): Line of Credit | Personal Loan | Student Loan | Other

Name Of Financial Institution: _____

Account Number: _____

Location of Related Documents: _____

Additional Details & Instructions:



SAFE DEPOSIT BOX

Ensure someone you trust knows how to access your safe deposit box.

Name Of Bank/Branch Location: _____

Account Number: _____ Box Number: _____

Key Location: _____

Authorized Users Contact Info: _____

Additional Details & Instructions:

OTHER VALUABLES & ASSETS

Keep track of any valuables, cash, or other assets you don't want disappearing after you're gone

Asset & Location: _____

Asset & Location: _____

Asset & Location: _____

Asset & Location: _____

NOTES & PERSONAL THOUGHTS

Use this section for any important information, personal thoughts, or anything we may have missed. Remember, you can do this all online. Create an Everplan so this info, along with much more, is neatly organized, securely stored, and easy to share with the people you care about most.

CREATE YOUR FREE EVERPLAN NOW: www.everplans.com

Create, store, and share all of the information in this document (and so much more) in a personalized Everplan so it's accessible to those who will need it.

Learn more about creating an Everplan at www.everplans.com.

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