



Financial Services Inventory

Because this document contains account access information, be sure to keep it in a secure location, e. g., a safe deposit box or locked fireproof box, and only share it with one or two trusted people.

Bank/Credit Union Accounts

List your bank/credit union account information (include checking, savings, certificates of deposit and money market accounts).

CHECKING ACCOUNTS

Company Name	Website	Log-In/Password	Account Number	Address/Phone	Beneficiary Name(s)

SAVINGS, MONEY MARKET SAVINGS, CERTIFICATES OF DEPOSIT

Company Name	Website	Log-In/Password	Account Number	Address/Phone	Beneficiary Name(s)



Credit Cards

List the names of the persons you have named in your end-of-life planning documents.

Company Name	Website	Log-In/Password	Account Number	Address/Phone	In Whose Name

Loans

List any outstanding loans you currently have including mortgage, auto and personal loans.

Type of Loan	Company Name	Website/Phone	Log-In/Password	Account Number	In Whose Name



Retirement Accounts

List any retirement accounts you have including 401(k)s, 403(b)s, 457s IRAs and self-employed retirement accounts.

Account Type	Company Name	Website/Phone	Log-In/Password	Account Number	Beneficiary Name(s)



Real Estate/Business Interests

List any real estate you currently own. Under "Ownership", note whether the property is tenancy in common, joint, or single ownership.

Property	Location/Address	Owner Name(s)	Ownership (tenancy in common, joint, or single)	Date Purchased	Purchase Price



Stocks, Bonds/Other Securities

List any stocks, bonds, mutual funds, or other securities you currently own that are not part of a retirement account.

Type (stock, bond, etc.)	Website/Phone	Log-In/Password	ID Number	Date Purchased	Purchase Price	Misc. Information (name of owner, # of shares, maturity date)



Education Savings Accounts

List any 529 Accounts, Education IRA/Coverdell or Custodial Accounts.

Account Type	Institution/Trustee	Website/Phone	Log-In/Password	Account Number	Beneficiary Name(s)

Health Insurance

List accident, disability, major medical, long-term care and Medicare policies.

Type (health, long-term care, disability, etc.)	Person(s) Insured	Name of Company Providing Insurance	Website/Phone	Log-In/Password	Policy Number	Coverage Amount



Property Insurance

List your insurance policies that you carry on property such as home, vehicle, land, and boats.

Insured Property	Company Name/Agent	Website/Phone	Log-In/Password	Policy Number	Coverage Amount

Life Insurance

List any life insurance policies you carry. Don't forget any policies you carry through your employer.

Person(s) Insured	Company Name/ Agent	Policy Type (whole, term, etc.)	Website/Phone	Log-In/Password	Policy Number	Beneficiary Name(s)