Protect Your Wealth

To help prepare, fill this financial inventory worksheet in yourself or give it to family members so they know how to access your financial life in the event of an emergency. Use this worksheet to keep track of the current status of your financial life. You should use a pencil as things may change, or keep this information in a digital document. Share it with your loved ones.

My Financial Inventory

I Have Life Insurance With:

Insurance Company

Policy #

Death Benefit

I Have Other Insurances With:

Insurance Company

Policy #

Death Benefit

I Have Personal Property:

Property Description

Value

Other Info

I have Bank Accounts With:

Name of Bank

Account #

Account Type

I Have Investment Accounts With:

Investment Company

Account #

Account Type

I Have Retirement Accounts With:

Retirement Account Name

Account #

Account Type

Monthly Bill Checklist

BILL	DUE DATE	AMOUNT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC