

MY ASSETS					
Name & Address of Institution	Account Number	Contact Person	Phone	E-mail	Website, Username, & Password
Checking & Debit Card Accounts					
Savings Accounts					
Homes/ Real Estate					
Vehicles					
Certificates of Deposit					
Stocks					
Bonds					
Mutual Funds					
Retirement/ Pension Plans					
Life Insurance Policies					

Other Assets	Account Number	Contact Person	Address/Location	Phone	E-mail
Put a check next to each type of asset you own, then enter the data for each asset.					
Airplanes					
Alimony Receivable					
Antiques					
Artwork					
Boats					
Bonuses Receivable					
Businesses Owned					
Buy/Sell Agreements					
Cemetery Plots					
Child Care Receivable					
Collections					
Combinations to Locks					
Copyrights					
Deferred Compensation Receivable					
Employer Benefits					
Foreign Income					
Frequent Flyer Miles					
Hidden Cash					
Home Improvement Receipts					
Home Inventory List/Photos/ Video					
Items on Loan to Others					

Other Assets	Account Number	Contact Person	Address/Location	Phone	E-mail
Limited Partnerships					
Livestock					
Loan Payments Receivable					
Location & Contents of Storage Units					
Location of Keys					
Mortgages Held					
Notes Held					
Partnerships					
Patents					
Pets					
Real Estate					
Retirement Benefits					
Royalties					
Safe Deposit Boxes & Location of Keys					
Social Security					
Stock Certificates					
Stock Options					
Tax-Related Documents (current year)					
Tax-Related Documents (prior years)					
Treasury Bills					
Valuable Home Furnishings					
Veteran's Benefits					

Other Assets:	Account Number	Contact Person	Address/Location	Phone	E-mail
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MY INSURANCE POLICIES						
Put a check next to each type of asset you own, then enter the data for each asset.						
Type of Insurance	Husband	Wife	Child #1	Child #2	Child #3	Child #4
Whole Life						
Term Life						
Travel						
Long Term Care						
Health (Primary)						
Health (Secondary)						
Dental						
Vision						
Homeowner's						
Personal Property						
Renter's						
Automobile						
Business Property						
Business Liability						
Worker's Comp						
Dishonesty Bond						
Other:						

Put a check next to each type of asset you own,
then enter the data for each asset.

Type of Insurance	
Insurance Company Name	
Mailing Address	
Broker's Name	
Broker's Mailing Address	
Broker's Phone	
Broker's Fax	
Broker's E-mail	
Policy Holder's Name	
Policy Number	
Amount of Insurance	
Location of Policy	
Other Information	
Type of Insurance	
Insurance Company Name	
Mailing Address	
Broker's Name	
Broker's Mailing Address	
Broker's Phone	
Broker's Fax	
Broker's E-mail	
Policy Holder's Name	
Policy Number	
Amount of Insurance	
Location of Policy	
Other Information	
Type of Insurance	
Insurance Company Name	
Mailing Address	
Broker's Name	
Broker's Mailing Address	
Broker's Phone	
Broker's Fax	
Broker's E-mail	
Policy Holder's Name	
Policy Number	
Amount of Insurance	
Location of Policy	
Other Information	

MY BILLS					
	Name of Creditor/ Vendor & Mailing Address	Account Number	Payment Frequency	Phone	Website, Username & Password
Credit Cards:					
Loans:					
Car Loan 2					
Mortgage Payment					
Home Equity Credit Line					
Household Bills:					
Cable TV					
Childcare					
Church/ Synagogue Pledges					
Debts/ Obligations					
Electricity					
Gas					
Insurance:					
Whole Life Insurance					
Term Life Insurance					
Travel Insurance					
Long Term Care Insurance					
Health Insurance					

HOUSEHOLD BILLS	Name & Address	Account Number	Payment Frequency	Phone	Website, Username & Password
Insurance:					
Dental Insurance					
Vision Insurance					
Homeowner's Insurance					
Personal Property Insurance					
Renter's Insurance					
Automobile Insurance					
Business Property Insurance					
Business Liability Insurance					
Worker's Comp Insurance					
Dishonesty Bond					
Other Insurance:					
Internet					
Laundry/Dry Cleaning					
Lawn Service					
Membership Dues:					
Pest Control					
Pet Sitting					
Pledges Made					
Rent					
Satellite TV					
Snow Removal					

	Name & Address	Account Number	Payment Frequency	Phone	Website, Username & Password
Subscriptions:					
Tax Payments:					
Telephone - cellular					
Telephone - landline					
Telephone - long distance					
Tuition					
Other:					
*					
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