

INVESTMENT INFORMATION

Organizing Investment Information and Statements

Saving Bonds, Money Market Funds, Certificate of Deposits, Stocks, Mutual Funds,

Investment Firm Name (e.g., "Vanguard", "Fidelity Mutual Fund", "E*Trade Stock Portfolio,")

Phone: _____

Firm Contact: _____

Address: _____

Account Number(s): _____

Joint Holder: _____

Primary Beneficiary (e.g., "Primary: Jane Doe, Relationship: Spouse")

Name & Relationship: _____

Contingent Beneficiary (e.g., "Contingent: Jane Doe, Relationship: Spouse")

Name & Relationship: _____

Document Access Information: Ensure that all necessary information to access the accounts is included.

Online banking login details

Username: _____

Password: _____

Physical location of statements: _____
