

FINANCIAL INFORMATION

Organizing Bank Accounts and Statements

List all Bank Accounts: Include Checking (C), Savings (S), & Joint Accounts

Primary Bank Name & Branch (e.g., "Bank of America, Main St Branch")

Bank Contact: _____ Phone: _____

Address: _____

Account Number: _____ C S

Joint Holder: _____

Beneficiary: _____

Debit / Credit Card Yes No Located: _____

Account Number: _____ C S

Joint Holder: _____

Beneficiary: _____

Debit / Credit Card Yes No

Located: _____ Pin Number : _____

Online Banking Yes No User Name: _____

Password: _____

Checks Yes No Located: _____

Safe Deposit Box Yes No Box Number: _____

Key Location: _____

Joint Owner: _____