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# Financial Inventory

FOR \_\_\_\_\_  
 DATE \_\_\_\_\_

## INVESTMENT ACCOUNTS (BROKERAGE, IRA, 401K, ANNUITIES)

Type of Account	Bank Name	Account Number	Telephone Number	Contact Name

Notes: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## BANK ACCOUNTS (CHECKING, SAVINGS, CD, MONEY MARKET)

Type of Account	Bank	Account Number	Telephone Number	Contact Name

Notes: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## LOAN ACCOUNTS (CAR, MORTGAGE, CREDIT CARDS, OTHER)

Type of Account	Bank/Company Name	Account Number	Telephone Number	Contact Name

Notes: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_