|  |  |  |
| --- | --- | --- |
|  | **Financial Information** |  |
|  |  |  |
| **Information** | **Response** |  |
| CPA / Tax accountant | Name: |  |
|  | Agency: |  |
|  | Phone: |  |
|  |  |  |
| Financial advisor | Advisor: |  |
| *(IRA, 401K, Brokerage Acct.,* |  |  |
| *Retirement Funds, etc.)* | Agency: |  |
|  | Phone: |  |
|  |  |  |
| Ready cash | Who knows location of cash? |  |
|  |  |  |
| Home safe / | Who knows location? |  |
| Safe deposit box | Who has access? |  |
|  |  |
|  |  |  |
| Home computer | Who has access? |  |
|  | Who knows password? |  |
|  |  |  |
| Bank account | Bank / type: |  |
| *(Checking, Savings, CDs,* |  |  |
| *Money Market, etc. – also* | Branch / phone: |  |
| *include Credit Unions)* | Authorized signer(s): |  |
|  |  |
|  |  |  |
| Bank account | Bank / type: |  |
|  | Branch / phone: |  |
|  | Authorized signer(s): |  |
|  |  |  |
| Bank account | Bank / type: |  |
|  | Branch / phone: |  |
|  | Authorized signer(s): |  |
|  |  |  |



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