

Info Sheet

Name:	Name:
D.O.B:	D.O.B:
SS #:	SS #:
Employer:	Employer:
Employer Contact:	Employer Contact:
Emergency Contact:	Emergency Contact:

CHECKING, SAVINGS & CDs

Description	Name on Account	Account #	Location	Rep Name/#

Notes/Comments

INVESTMENT ASSETS:

RETIREMENT ACCOUNTS

DESCRIPTION (401k, Roth, IRA, Etc.)	Company	Account #	Location	Rep Name/#

Notes/Comments

NON-RETIREMENT ACCOUNTS

DESCRIPTION (Individual, Joint, Trust, Etc.)	Name on Account	Account #	Location	Rep Name/#

Notes/Comments

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ANNUITIES

DESCRIPTION	Company	Account #	Location	Rep Name/#

Notes/Comments

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INSURANCE- Life, Health, Long Term Care

DESCRIPTION	Company	Account #	Location	Rep Name/#

Notes/Comments

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REAL ESTATE ASSETS

DESCRIPTION (Principal Residence, Vacation Home, Rental Property, Land)	Name of Owner(s)	Address

Notes/Comments

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MISCELLANEOUS ASSETS- Safe Deposit Box, Safes, Etc.

DESCRIPTION	Name on Account	Account #/Password	Location	Contact #

Notes/Comments

IMPORTANT DOCUMENTS- Trusts, Birth Certificates, Deeds, Etc.

DESCRIPTION	Location

Notes/Comments

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