Personal Financial Information

OPTIONAL

The purpose of this form is to help you leave concise financial information for your loved ones. This form is not given to Saint Bartholomew's Episcopal Church. It is wise, however, to keep this completed form with all your other Finishing Well documents.

The following form is not meant to be exhaustive. Everyone has different financial arrangements and insurance policies. Please use this form to "jog your memory" regarding pertinent financial information.

Consider discussing your financial affairs with your accountant or financial planner. If you do not have one, consider finding one. Also, discuss your finances with your attorney and be sure information is included in your will.

It is important to keep this document in a safe, secure location. Investing in a lockbox or personal safe is a good choice. Regardless, have it easily accessible as it is important to review this document on a regular basis since financial information changes often.

Review annually (or more frequently) during the tax season. Sign and date it as revised.

Notify your heirs that this form has been completed for their information.

11/16/2015

Section 1: Contact information for Investment Counselor/Financial Planner/Banker/Lawyer etc…

Please include the name and credentials, address, email and phone number of each professional.

1.____
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2.____
____

3.____
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4.____
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5.____
____

6.____

____

Section 2: Bank Accounts/Savings Institution Accounts/Other Income Producing Accounts:

Please include the name of the Institution, type of account and the account number. Please include User ID's and passwords. Use one line for each account.

1.____ ________

2.____

3.____

4.____

5.____

6.____

Safe Deposit Box Number and Location ____

Location of Safe Deposit Key ____

Location of Car keys/ Registration ____

Consider making a list of Accounts Payable (debts) and Accounts Receivable (monies owed to you)

Section 3: Insurance Information

Include the name of your Insurance Broker(s), the type of insurance, certificate number and the beneficiary. Please specify where the actual policies are located.

1.____
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2.____
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3.____
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4.____
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5.____
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Section 4: Credit Card/ Charge Account information:

Check your credit score on a regular basis. Consider using TransUnion (www.transunion.com) or Equifax (www.equifax.com). This way you can monitor how many credit cards you have and protect yourself from identity theft. Keep your credit score documents with this financial form.

Include the name, card number and phone number for each credit card. Also, include User ID's and passwords. Please use one line for each card:

1.____

2.____

3.____

4.____

5.____

Section 5: Miscellaneous User Names/ Passwords/Codes

Please think through all pass codes etc…for your cell phones, home phones, computer codes etc…

1.____

2.____

3.____

4.____