

# **FINANCIAL SNAPSHOT**

- List of all accounts (bank, investments, retirement)
- Credit cards & loans
- Where money is held (not statements)
- Physical Keys

## **Checking**

Bank Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Routing Number: \_\_\_\_\_

## **Savings**

Bank Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Routing Number: \_\_\_\_\_

## **Physical Key**

Description: \_\_\_\_\_ (also see enclosed picture)

Location: \_\_\_\_\_

Goes to: \_\_\_\_\_