

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: _____