

# 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: \_\_\_\_\_