



# Financial inventory

Put it on your to-do list



Wouldn't you like to have your financial information organized in one convenient place? Do your loved ones (and yourself) a favor, and fill out this financial inventory so they can reference important information in case of an emergency.

Once you've completed the inventory, keep this list in a secure location and make sure your estate executor or other responsible party knows this document exists.

## Key contacts and documents

Your name: \_\_\_\_\_

Date updated: \_\_\_\_\_

Review at least once a year or with any major life event

### Who should I contact?

Financial advisor: \_\_\_\_\_

Executor: \_\_\_\_\_

(phone/email) \_\_\_\_\_

(phone/email) \_\_\_\_\_

Accountant: \_\_\_\_\_

Power of Attorney: \_\_\_\_\_

(phone/email) \_\_\_\_\_

(phone/email) \_\_\_\_\_

Attorney: \_\_\_\_\_

Health care Power of Attorney: \_\_\_\_\_

(phone/email) \_\_\_\_\_

(phone/email) \_\_\_\_\_

### Where can I find it?

Safe deposit box: \_\_\_\_\_

Social Security card: \_\_\_\_\_

Birth certificate: \_\_\_\_\_

Will/living will: \_\_\_\_\_

Marriage license: \_\_\_\_\_

Passport/citizenship: \_\_\_\_\_

## Important accounts and policies Remember to keep this document in a safe place.

**Insurance** (home/renters insurance, auto, life, disability, etc.)

Policy type	Company	Agent/contact	Phone	Policy #/Acct #

**Retirement accounts** (401(k)s, IRAs, company pension plans, etc.)

Account type	Institution	Acct #	Website or phone #

**Other investments** (mutual funds, bonds, 529s, etc.)

Account type	Institution	Acct #	Website or phone #

**Bank info** (checking, savings, etc.)

Account type	Institution	Acct #	Website or phone #

**Loans/debts** (mortgage, student loans, personal loans, etc.)

Account type	Institution	Acct #	Website or phone #



[principal.com](http://principal.com)

This financial account inventory is accurate as of the date listed above and is intended for personal use only. Always keep in a secure location, and ensure your estate executor or other responsible party knows this exists.

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