

My Property:

Current Home

Land or Lot

Investment Property

Address	Value	Notes

My Income:

Employment

Government

Child Support

Name	Amount	Notes

My Accounts:

Savings

Money Markets

Other Investments

Checking

Retirement
Accounts

Financial Institution	Type	Account Titling	Balance

Digital Account Access:

Passwords

Payment Accounts

Rewards Programs

Email Accounts

Apps

Digital Wallet

Company	Username	Website

My Insurance:

Life Insurance

Vehicle Insurance

Homeowners

Dependent
Insurance

Renters Insurance

Insurance

Company	Phone Number	Policy #	Beneficiary

Documents to Visit:

- Your Will
- Trust Documents
- Power of Attorney
- Real Estate Deeds
- Beneficiaries
- Vehicle Titles

Document	Date Drafted	Dated Signed	Date Revised

Building Your Team:

- Financial Coach
- Therapist
- Doctor
- Financial Planner
- Accountant
- Employee Resource
- Estate Planner
- Appraiser
- School Resources

Name	Title	Phone Number	Notes

