

## FINANCES WORKSHEET

Category could include banks, investments, individual retirement accounts, credit cards, debit cards, savings, certificates of deposit, checking, trust fund, mortgage loans, home equity lines of credit, personal loans, auto loans.

CATEGORY	TYPE OF ACCOUNT	NAME OF BANK or COMPANY	ACCT NUMBER	PIN #	CONTACT & PHONE

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## FINANCES (cont'd) SOURCES OF INCOME

Sample sources of Income could include current employment, retirement, social security, investments, IRA distributions, rental property income, farm income, sale of a business, other.

SOURCE OF INCOME	WHOSE INCOME?	NAME OF SOURCE	ACCT NUMBER	PIN #	CONTACT & PHONE

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## MEDICAL CHECKLIST

DR. OR INSURANCE CO.	TYPE OF DR. or INSURANCE	WHOSE DR?	WEBSITE/ACCT #	PIN # OR PW	CONTACT & PHONE

## PROPERTY CHECKLIST

(Type of property could include home, rental, vacation, auto, truck, boat, camper, trailer)

TYPE OF PROPERTY	ADDRESS OF PROPERTY	LOAN ON PROPERTY?	LOAN WITH WHOM?	ACCT #	CONTACT & PHONE

## PROPERTY CHECKLIST (cont'd)

(Type of property could include home, rental, vacation, auto, truck, boat, camper, trailer)

TYPE OF PROPERTY	ADDRESS OF PROPERTY	LOAN ON PROPERTY?	LOAN WITH WHOM?	ACCT #	CONTACT & PHONE

## INSURANCE CHECKLIST

(Type of insurance could include home, rental, auto, life, boat, camper, trailer, atv, accidental, etc.)

TYPE OF INSURANCE	CARRIER	POLICY NUMBER	CONTACT & PHONE



# COMMON SENSE WORKSHEET

This worksheet may contain a mixture of information. There are no titles at the top of the worksheet columns so you may add your own. Some of this information may include contact information, memberships, passwords, cell phones, internet, utilities companies, lawn maintenance, tools, keys, alarms, pets, household repairs, chargers, remote controls, tax documents, and safe contents.


## COMMON SENSE WORKSHEET (cont'd)

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