

# Financial Information

## Bank/Savings & Loan/Credit Union

Name \_\_\_\_\_ Address \_\_\_\_\_

Contact \_\_\_\_\_ Phone/Email \_\_\_\_\_ Account type(s) \_\_\_\_\_

Account number(s) (last four digits only) \_\_\_\_\_ Signatures on account \_\_\_\_\_

Internet banking website \_\_\_\_\_ Password(s) \_\_\_\_\_

Debit/Check Card account number (last four digits only) \_\_\_\_\_ PIN \_\_\_\_\_

Safe deposit box:  yes  no Box number \_\_\_\_\_ Key location \_\_\_\_\_

Signee(s): \_\_\_\_\_

Name \_\_\_\_\_ Address \_\_\_\_\_

Contact \_\_\_\_\_ Phone/Email \_\_\_\_\_ Account type(s) \_\_\_\_\_

Account number(s) (last four digits only) \_\_\_\_\_ Signatures on account \_\_\_\_\_

Internet banking website \_\_\_\_\_ Password(s) \_\_\_\_\_

Debit/Check Card account number (last four digits only) \_\_\_\_\_ PIN \_\_\_\_\_

Safe deposit box:  yes  no Box number \_\_\_\_\_ Key location \_\_\_\_\_

Signee(s): \_\_\_\_\_

## Finance/Mortgage Company

Name \_\_\_\_\_ Company \_\_\_\_\_ Website \_\_\_\_\_

Phone/Email \_\_\_\_\_ Account type(s) \_\_\_\_\_

Account number (last four digits only) \_\_\_\_\_ Item(s) financed \_\_\_\_\_

## Credit Cards

VISA  MasterCard  Discover  Am Ex  Other \_\_\_\_\_ Issued by: \_\_\_\_\_

VISA  MasterCard  Discover  Am Ex  Other \_\_\_\_\_ Issued by: \_\_\_\_\_

VISA  MasterCard  Discover  Am Ex  Other \_\_\_\_\_ Issued by: \_\_\_\_\_

## Investment Consultant/CFP/Broker

Name \_\_\_\_\_ Company \_\_\_\_\_ Website \_\_\_\_\_

Address \_\_\_\_\_ Phone/Email \_\_\_\_\_

Statements location \_\_\_\_\_

IRAs/investments \_\_\_\_\_

## Special Investments/Pensions

Type \_\_\_\_\_ Contact \_\_\_\_\_ Phone/Email \_\_\_\_\_

Provided through: \_\_\_\_\_ Account number (last four digits only) \_\_\_\_\_

Type \_\_\_\_\_ Contact \_\_\_\_\_ Phone/Email \_\_\_\_\_

Provided through: \_\_\_\_\_ Account number (last four digits only) \_\_\_\_\_

## CPA/Bookkeeper

Name \_\_\_\_\_ Company \_\_\_\_\_ Website \_\_\_\_\_

Address \_\_\_\_\_ Phone/Email \_\_\_\_\_

Services provided \_\_\_\_\_

Income tax preparation:  Yes  No Years: \_\_\_\_\_ to \_\_\_\_\_ Location of returns \_\_\_\_\_