



[MONEY]

joint account info sheet

Fill out all financial info below, then figure out which accounts you want to keep and which ones you want to merge. Circle the keepers and cancel the others. Use the second sheet to keep track of your updated info.

before

HER ACCOUNTS

Checking _____
Account number _____
Balance _____

Savings _____
Account number _____
Balance _____

Investment account _____
Account number _____
Balance _____

Credit card #1 _____
Account number _____
Balance _____
Interest rate _____

Credit card #2 _____
Account number _____
Balance _____
Interest rate _____

Car insurance _____
Account number _____
Payment _____

Life insurance _____
Account number _____
Payment _____

Health insurance _____
Account number _____
Copayment _____

HIS ACCOUNTS

Checking _____
Account number _____
Balance _____

Savings _____
Account number _____
Balance _____

Investment account _____
Account number _____
Balance _____

Credit card #1 _____
Account number _____
Balance _____
Interest rate _____

Credit card #2 _____
Account number _____
Balance _____
Interest rate _____

Car insurance _____
Account number _____
Payment _____

Life insurance _____
Account number _____
Payment _____

Health insurance _____
Account number _____
Copayment _____

Disability insurance _____
Account number _____
Payment _____

Loan #1 _____
Account number _____
Payment _____
Interest rate _____

Loan #2 _____
Account number _____
Payment _____
Interest rate _____

Disability insurance _____
Account number _____
Payment _____

Loan #1 _____
Account number _____
Payment _____
Interest rate _____

Loan #2 _____
Account number _____
Payment _____
Interest rate _____

after

OUR ACCOUNTS

Checking #1 _____
Account number _____
Balance _____
Phone/website/login _____

Checking #2 _____
Account number _____
Balance _____
Phone/website/login _____

Savings _____
Account number _____
Balance _____
Phone/website/login _____

Investment account _____
Account number _____
Balance _____
Phone/website/login _____

Credit card #1 _____
Account number _____
Balance _____
Interest rate _____
Phone/website/login _____

Credit card #2 _____
Account number _____
Balance _____
Interest rate _____
Phone/website/login _____

Car insurance _____
Account number _____
Payment _____
Phone/website/login _____

Life insurance _____
Account number _____
Payment _____
Phone/website/login _____

Health insurance _____
Account number _____
Copayment _____
Phone/website/login _____

Disability insurance _____
Account number _____
Payment _____
Phone/website/login _____

Loan #1 _____
Account number _____
Payment _____
Interest rate _____
Phone/website/login _____

Loan #2 _____
Account number _____
Payment _____
Interest rate _____
Phone/website/login _____