

Our Accounts

➡ Keep your investment and savings statements here (even if you bank online), along with account numbers and other finance-related records.

Account Checklist

- | | |
|------------------------------------|--------------------------------------|
| <input type="checkbox"/> Savings | <input type="checkbox"/> Credit card |
| <input type="checkbox"/> Savings | <input type="checkbox"/> Loan |
| <input type="checkbox"/> Checking | <input type="checkbox"/> Loan |
| <input type="checkbox"/> Checking | <input type="checkbox"/> Mortgage |
| <input type="checkbox"/> 401K | <input type="checkbox"/> _____ |
| <input type="checkbox"/> 401K | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Brokerage | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Brokerage | <input type="checkbox"/> _____ |

Financial Contacts

Financial planner _____
 Phone/email _____
 Broker _____
 Phone/email _____
 Broker _____
 Phone/email _____
 Other _____
 Phone/email _____

Account type _____
 Company _____
 Account owner _____
 Account number _____
 Customer service _____
 Website _____
 Login information _____

Account type _____
 Company _____
 Account owner _____
 Account number _____
 Customer service _____
 Website _____
 Login information _____

Account type _____
 Company _____
 Account owner _____
 Account number _____
 Customer service _____
 Website _____
 Login information _____

Account type _____
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Login information _____

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Account owner _____
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Customer service _____
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Login information _____

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Customer service _____
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Login information _____

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Account owner _____
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Website _____
Login information _____

Account type _____
Company _____
Account owner _____
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Customer service _____
Website _____
Login information _____

Account type _____
Company _____
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Account number _____
Customer service _____
Website _____
Login information _____

TIP: Separate your account records in this binder with labeled dividers for each account.

 Learn the pros and cons of combining accounts.
[->>TheNest.com/money](https://TheNest.com/money)