

What Your Spouse Should Know if *Something* Happens to You

ASSETS

Bank Accounts

Include: Checking, Saving /Money Market, Education, CDs, and Other

#1 Bank Name _____

Location _____

Account Name _____ Account Type _____

Signer(s) on the account _____

Routing # _____ Account # _____

Name of Heir(s), if there is a "Payable on Death" document on file _____

#2 Bank Name _____

Location _____

Account Name _____ Account Type _____

Signer(s) on the account _____

Routing # _____ Account # _____

Name of Heir(s), if there is a "Payable on Death" document on file _____
