Note: To save a digital version once completed, save under a new name on your hard drive.

What Your Family 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_____

_____

_____