Snider **Advisors**

CHECKLIST OF FINANCIAL ACCOUNTS TO TRACK

This is an extra resource to go along with the original article:

How to Keep Your Spouse Up-to-Date About Finances

Use this checklist to ensure that you're tracking important financial accounts.

Bank Accounts: Checking & Savings

Title	Company	Number

Retirement Accounts: 401(k), 403(b), 457, IRA, Roth, etc.

Title	Company	Number

Brokerage Accounts: Individual, Joint, & Trusts

Title	Company	Number

Insurance: Life, Disability, Long Term Care

Title	Company	Number

Specialty Accounts: HSAs, 529s, Inherited IRAs, etc.

Title	Company	Number

Credit Accounts: Mortgage, HELOC, Credit Cards, Auto, & Personal Loans

Title	Company	Number

Others

Title	Company	Number

Be very careful with this form. It should be stored in a secure location. You can also use this as an opportunity to consolidate accounts where appropriate.

The intent of this handout is to help expand your financial education.
All investors should consult a qualified professional before trading in any security.

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