Accounts and Assets Inventory

For: _____

Date: _____

Record which institutions and kinds of accounts exist, and where statements are kept. **Do not write account numbers, balances, PINs or passwords on this page.**

Type	Institution and contact	Joint?	Beneficiary	Where statements are
Chequing / savings				
Investments / RRSP / TFSA / 401(k)				
Pension or annuity				
Life insurance				
Home / tenant insurance				
Car insurance				
Mortgage / loans / credit cards				
Safety deposit box				