

Financial Account Inventory

Be Prepared, Just In Case

If someone snatches your wallet or manages to break through your cyber Fort Knox, having a handy list of all your accounts can keep damage to a minimum.

On the worksheet below, write down the vitals for each of your accounts. Note in the far right column when the bill typically arrives in the mail. (Mailbox thieves often have financial statements re-routed so they can take over a victim's accounts.) Make copies of the completed inventory and keep it in a secure place.

Credit Cards	Name on Card/Account	Account Number and Identification Number	Expiration Date	Statement/Billing Cycle
Debit/Bank Cards/Accounts				

Financial Account Inventory

Credit Cards	Name on Card/Account	Account Number and Identification Number	Expiration Date	Statement/Billing Cycle
Credit/Charge Cards				
Brokerage/IRA Account(s)				
Other				