Assets & Accounts Inventory

List what you own and what you owe so nothing is missed. Use only the last four digits of account numbers — never full numbers or passwords.

Bank and credit union accounts

Bank or credit union	Type	Last 4	Owner or joint	POD beneficiary

Retirement and investment accounts

Company	Type (401k, IRA…)	Last 4	Beneficiary

Home, land and vehicles

Property or vehicle	Whose name it's in	Lender, if any

Debts

Lender	Type (mortgage, card…)	About how much	Last 4

OTHER VALUABLES: JEWELRY, COLLECTIBLES, A SAFE DEPOSIT BOX, A BUSINESS, MONEY OWED TO ME

For your personal records. This kit is not a will and is not legal advice. Laws vary by state; talk to a licensed attorney about your situation.