



# Love Your Family Checklist

## Banking Accounts (Checking, Saving)

Account Type	Institution	Account Number	Website	Online ID	Online Banking Password

## Investment Accounts (Stocks, CDs, IRAs)

Account Type	Institution	Contact Name	Account Number	Website	User Name	Password	Contact Phone Number / eMail



## Credit and Debit Cards

Account Type	Institution	Account Number	Website	User Name	Password	Contact Phone Number / eMail

## Property - Mortgage (Rental Property)

Address	Mortgage Lender	Payment Due	Assoc. Fees	Title	Website	Contact Phone Number / eMail



**Property – Vehicle** (Recreational vehicles, Boats, Motorcycles)

Year, Make & Model	Lender	Payment Due	Title	Website	Contact Phone Number / eMail

**Life Insurance**

Insured	Policy Located	Policy Number	Company	Contact Phone Number / eMail

**Safety Deposit Box**

Located	Address	Key located	Signers



## Utilities

Utility Service	Provider	Payment Due	How Paid	Account number	User Name	Password
Electricity						
Gas						
Garbage						
Water/Sewer						
Phone						
Cell						
Internet						
TV / Cable						



## Online Payments (Auto Pay, Subscriptions, Bill Pay, Online Services)

Product/Service	Provider	Auto Payment From	Website	User Name	Password

## Personal

Item	User Name	Password
Phone		
Personal Computer		
Facebook		



## Health Care

Provider	Phone Number	Notes