

# INTRODUCTION

You're living on the financial edge, wish you could save more, and are worried about retirement. When it comes to money and responsibility, most of us would prefer sticking our heads in the sand, not wanting to know how much we owe and to whom. Sure, you knew buying those new shoes would be a guilty pleasure you deserved, but was it one you could afford? The truth, especially the financial truth, will always find you sooner or later, so it's better if you find it before it finds you.

The best way to try to expand your financial horizons is by knowing your financial limitations. Owning up to your financial past is the best route to securing your financial future. Being able to access the answers, and the people, in banking and lending institutions, as well as your lawyer, provides peace of mind. Let these charts be your guide. By helping you be able to quickly locate contacts, fill out your expense checklists, and simplify the complicated modern web of bills and accounts that we all have, you'll see how you can cut expenses and make necessary modifications.

It's hard to believe, but we find a certain comfort in knowing our entire financial picture at all times—what we're worth and what we owe. It makes us feel way more in control.

# FINANCIAL, LEGAL, AND INSURANCE

HAVE YOU NOTICED THAT AS YOUR LIFE GETS BIGGER, SO DOES THE NUMBER OF PEOPLE REQUIRED TO MANAGE IT? AND THE TAX ID AND OTHER NUMBERS YOU NEED TO REMEMBER AND HAVE AT YOUR FINGERTIPS ARE STAGGERING. WELL, WHAT DO YOU EXPECT WHEN YOUR SEVEN-YEAR-OLD CHILD HAS HIS OR HER OWN ONLINE TRADING ACCOUNT? HELLO? RELAX. WE TOTALLY HAVE YOU COVERED. CONSIDER OPENING A JOINT ACCOUNT. THIS WAY IF YOU'RE INCAPACITATED, YOUR SPOUSE CAN GAIN ACCESS. FOR THE SAME REASON, YOU MAY ALSO WANT A JOINT ACCOUNT WITH A CHILD OR AGING PARENT.

## ACCOUNTANT

Name	Assistant	
Address	Work	Fax
	Home	E-mail
	Cell	

# BANK AND BROKERAGE ACCOUNTS

## MY ACCOUNTS

ACCOUNT TYPE	NAME AND ACCOUNT #	ACCOUNT EXEC.	CONTACT NUMBERS
Checking			
Personal			
Joint (with whom)			
Savings			
Personal			
Joint (with whom)			
Brokerage			
Personal			
Joint (with whom)			
Limited Partnerships			
Personal			
Joint (with whom)			
Online Trading	Web site	Username	Password
Stock brokerage #1			
Stock brokerage #2			

## SPOUSE/PARTNER

ACCOUNT TYPE/NAME	BRANCH OFFICE	ACCOUNT #	CONTACT NUMBERS
Checking			
Personal			
Joint (with whom)			
Savings			
Personal			
Joint (with whom)			
Brokerage			
Personal			
Joint (with whom)			
Limited Partnerships			
Personal			
Joint (with whom)			
Online Trading	Web site	Username	Password
Stock brokerage #1			
Stock brokerage #2			

This is just a sample.

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