



Financial Accounts Inventory

- 1. Make a list of the institution names, types of financial accounts (e.g., savings, checking, 401(k), etc.), contact information for customer service and the Web address for each institution. In addition, make note of whether or not you have an online account.

Account Type	Institution Name	Customer Service Number	Web Address	Online Account?

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2. Way to go! Now that you have gathered your financial account information, you are well-prepared to stay on top of account balances and transactions.

