

Bank and Brokerage Account Inventory

Bank Accounts		
	Bank 1	Bank 2
Name of Bank		
Address		
Telephone Number		
Account Number		
Bank Officer		
Average Balance	\$	\$
Type of Account (Checking, Money Market, Savings)		
Ownership of Account (Individual, Joint, Joint and Survivorship)		

Brokerage Accounts		
	Brokerage 1	Brokerage 2
Firm Name		
Address		
Telephone Number		
Account Number		
Broker		
Value as of _____	\$	\$
Type of Account (Personal, Retirement, Trust)		
Ownership of Account (Individual, Joint, Trust)		