Managing Your Personal Accounts

American Century Investments®

Account Reference Sheet

Managing finances today is complex, often involving multiple accounts from basic checking to conduit IRAs. This worksheet helps track your different accounts and is most useful if you follow three simple steps:

1. **Update annually. Accounts and contact information change, the list is only as helpful as the information on it.**
2. **Store the list in a secure location such as a safe or safety deposit box to prevent identify theft.**
3. **Keep an updated copy with your will and/or with a trustworthy friend or family member in case of emergency.**

Checking/Savings/CDs

Account Type	Account Number	Financial Institution	Address/Phone	PIN
Checking				
Savings				
CD				

Insurance

Policy Type	Insured (you, spouse)	Policy Number	Insurance Company	Address/Phone	PIN/Access Code
Term Life					
Employer					
Disability					
Prop/Cas					

Brokerage Accounts

Account Type	Account Number	Broker Dealer	Financial Advisor	Address/Phone	PIN/Access Code

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Retirement Plans

Policy Type	Account Numbers	Policy Number	Insurance Company	Address/Phone	PIN/Access Code
401(k)-Me					
401(k)-Spouse					
IRA-Me					

Other

Investment Type	Financial Institution	Address/Phone	Other Important Information
Real Estate			
Stock Options			
Partnerships			

Other Important Information

Outstanding Loans

Loan Type	Company	Contact Information
Car		
Line of Credit		

Credit Cards

Card Types	Card Number	Cancellation Phone Number	Billing Address

Contact Information

Profession	Name/Company	Address	Phone Number
Attorney			
Accountant			
Financial Advisor			
Realtor			

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