



# PERSONAL FINANCIALS

## EASY TO FIND FINANCIALS

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While you can usually access your personal financial information online, hard copies or notes about your accounts can be helpful in an emergency or when online access is impossible. You need to update this section at least once a year.

### File Here:

- Financial account information: bank, credit union, brokers and other investments (401K, IRA, TSP, etc.)
- Include account numbers and name of institution
- Most recent end-of-year statements
- Account beneficiary information
- Leave and earning statement (LES)/Paystub
- Tax Returns – State/Federal (most recent)
- Social security disability insurance
- Savings bonds or electronic bond information
- Safe deposit box information
- Location of usernames and passwords\*
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### You should also know...

Every time you update this folder (at least once a year) check for accuracy of accounts, financial institutions, beneficiaries, correct address, etc. Make sure your spouse/partner or trusted friend knows how to access this information.

*Hint: Keep your usernames and passwords in a separate location.*

*\*View our tips online to find out how to safely store your passwords and usernames.*

### NOTES:

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