

## Personal Financial Inventory

Asset Name & Account Type (IRA, 401(k), etc.)	What is its value?	Who owns it?	Who gets it after me?	Where is it? Who manages it?	What's in it? (mutual funds, stocks, etc.)	What are the Costs?	How is it taxed?	Is it easily sold or changed?	Do I understand it?	WHAT IS IT FOR?

## Personal Financial Inventory

Income Source Name	Who owns it?	Account Type (Social Security, pension, annuity, etc.)	When does the income start? Are there multiple options?	How much does it pay?	Will/could income increase?	Who manages it? (gov, employer, insurance co, etc.)	What are the Costs?	How is it taxed?	Do I understand it?	Is there a survivor benefit, or does it stop when I die?	WHAT IS IT FOR?
			If start at age: _____ Pays \$ _____ per _____.  If start at age: _____ Pays \$ _____ per _____.  If start at age: _____ Pays \$ _____ per _____.								