

Financial Preparedness Quick-Reference

1

CASH ON HAND



Target Amount: \$ _____

Storage Location: _____

2

BANKING



Primary Bank

Bank Name: _____

Phone Number: _____

Account Last 4 Digits: _____

Backup Bank

Bank Name: _____

Phone Number: _____

Account Last 4 Digits: _____

3

INSURANCE



Home/Renters Insurance:

Company: _____

Policy/Acct #: _____

Phone Number: _____

Health Insurance:

Company: _____

Policy/Acct #: _____

Phone Number: _____

Auto Insurance:

Company: _____

Policy/Acct #: _____

Phone Number: _____

4

IMPORTANT DOCUMENTS



Document Name

Storage Location

5

EMERGENCY CONTACTS



Name

Phone Number

*In Case
You Need This—
We've Got
You Covered.*



Cash On Hand Target: \$ _____

Location: _____



Primary Bank: _____

Acct Last 4: _____

Phone: _____



Insurance (Home/Renters): _____

Policy #: _____

Phone: _____



Insurance (Health): _____

Policy #: _____

Phone: _____



Insurance (Auto): _____

Policy #: _____

Phone: _____



Emergency Contact:

Name: _____

Phone: _____

