

Financial Preparedness

Quick-Reference

1

CASH ON HAND

Target Amount: \$ _____

.....

Storage Location: _____



2

BANKING

Primary Bank Name: _____

Customer Service Number: _____

Account Last 4 Digits: _____

Backup Bank Name: _____

Customer Service Number: _____



3

INSURANCE

Home or Renters Insurance

Agent Name: _____

Phone Number: _____

Health Insurance

Insurance ID: _____

Insurance Number: _____

Auto Insurance

Insurance Company: _____

Policy Number: _____



4

IMPORTANT DOCUMENTS

Document



Storage Location

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____



5

EMERGENCY CONTACTS

Name



Phone Number

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____



Prepared today. Peace of mind tomorrow.