

Financial

Check those that apply



Record	Date Completed
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Bank Accounts

<input type="radio"/> Checking	
<input type="radio"/> Savings	
<input type="radio"/> CD	
<input type="radio"/> Money Market	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	

Credit and Charge Cards

<input type="radio"/> Visa	
<input type="radio"/> MasterCard	
<input type="radio"/> American Express	
<input type="radio"/> Discover	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	

Loans

<input type="radio"/> Auto	
<input type="radio"/> Education	
<input type="radio"/> Mortgage	
<input type="radio"/> Personal	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	

Housing

<input type="radio"/> Landlord	
<input type="radio"/> Tenants Association	
<input checked="" type="checkbox"/>	

Record	Date Completed
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Employment

<input type="radio"/> Payroll	
<input type="radio"/> Benefits Administrator	
<input type="radio"/> Pension Administrator	
<input type="radio"/> Co. Directory / ID Card	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	

Insurance

<input type="radio"/> Auto	
<input type="radio"/> Medical	
<input type="radio"/> Homeowners / Renters	
<input type="radio"/> Dental	
<input type="radio"/> Unemployment / Disability	
<input type="radio"/> Vision	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	

Investments

<input type="radio"/> IRA	
<input type="radio"/> 401k	
<input type="radio"/> Pension	
<input type="radio"/> Brokerage	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	

Legal Documents

<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	

Business

Check those that apply



Record	Date Completed
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Record	Date Completed
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Local Business

<input type="radio"/> Dry Cleaner	
<input type="radio"/> Health Club	
<input type="radio"/> Pet Care	
<input type="radio"/> Supermarket (club card)	
<input type="radio"/> Salon	
<input type="radio"/> Video Store	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	

Professionals

<input type="radio"/> Accountant	
<input type="radio"/> Attorney	
<input type="radio"/> Contractor	
<input type="radio"/> Investment Advisor	
<input type="radio"/> Travel Agent	
<input type="radio"/> Veterinarian	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	

Shopping / Internet

<input type="radio"/> Auction	
<input type="radio"/> Book / Music Club	
<input type="radio"/> Discount Warehouse	
<input type="radio"/> Retail	
<input type="radio"/> Travel / Frequent Flyer	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	

Health Care

<input type="radio"/> Dentist	
<input type="radio"/> Family Practitioner	
<input type="radio"/> Gynecologist	
<input type="radio"/> Optometrist	
<input type="radio"/> Pharmacist	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	

Services

<input type="radio"/> Cellular / Wireless	
<input type="radio"/> Internet	
<input type="radio"/> Television	
<input type="radio"/> Electricity	
<input type="radio"/> Water	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	

Subscriptions

<input type="radio"/> Magazine	
<input type="radio"/> Newspaper	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	

Memberships

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Record	Date Completed
Organizations	
<input type="radio"/> Academic Society	
<input type="radio"/> Alumni Association	
<input type="radio"/> Charity	
<input type="radio"/> Church / Religion	
<input type="radio"/> Political	
<input type="radio"/> Sorority	
<input type="radio"/> Trade Association	
X	
X	
X	
X	

Record	Date Completed
Clubs	
<input type="radio"/> Academic	
<input type="radio"/> Sport / Recreation	
<input type="radio"/> Social	
X	
X	
School	
<input type="radio"/> Student Records / ID	
<input type="radio"/> Transcripts	
<input type="radio"/> Scholarships and Grants	
X	
X	

Family and Friends

X
X
X
X
X
X
X
X
X
X
X
X
X
X
X
X

Groom's Records	
<input type="radio"/> Employer	
<input type="radio"/> Insurance	
X	
X	
X	

Children's Records	
<input type="radio"/> School	
<input type="radio"/> Insurance	
<input type="radio"/> Activity	
X	
X	