FINANCIAL ACCESS CHECKLIST

Do you or your spouse handle most of your financial activities? If your spouse were not here today, would you know the passwords to your Online accounts, how to pay your bills, be able to find the deed to your house, or access the contact information for your accountant? Below is a checklist of information that should be shared with your spouse to assure you each have access to manage important financial tasks independently.

In summary, it is important to make your partner aware of all financial aspects you manage to avoid any potential issues with gaining access to an account, locating important documents, or retrieving specific information. If you have any questions, contact us or learn more about our services.

QUESTIONS?

Contact us at info@lutz.us or 402.496.8800

Lutz

ACCOUNTING · FINANCIAL · TECH · M&A · TALENT

TRUSTED ADVISOR	INFORMATION	
ACCOUNTANT	Company Name:	☐
	Contact Name:	☐
	Phone and Email:	☐
	Additional Information:	☐
LAWYER	Company Name:	☐
	Contact Name:	☐
	Phone and Email:	☐
	Additional Information:	☐
FINANCIAL ADVISOR	Company Name:	☐
	Contact Name:	☐
	Phone and Email:	☐
	Additional Information:	☐
INSURANCE AGENT	Company Name:	☐
	Contact Name:	☐
	Phone and Email:	☐
	Additional Information:	☐
BANKER	Company Name:	☐
	Contact Name:	☐
	Phone and Email:	☐
	Additional Information:	☐

ITEM	INFORMATION	
LIFE INSURANCE	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
HEALTH INSURANCE	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
LONG-TERM CARE INSURANCE	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
DISABILITY INSURANCE	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
CAR INSURANCE	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
HOME INSURANCE	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
OTHER INSURANCE POLICIES (THEFT, FIRE, EARTHQUAKE, UMBRELLA, ETC.)	Important Information:	☐

ACCOUNT	INFORMATION	
CHECKING ACCOUNT(S)	Company Name:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
SAVINGS ACCOUNT(S)	Company Name:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
MONEY MARKET ACCOUNT(S)	Company Name:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
CERTIFICATES OF DEPOSITS (CDS)	Company Name:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
SAFE DEPOSIT BOX	Box Number:	☐
	Keys:	☐
	Location:	☐
	Additional Information:	☐
CREDIT + DEBIT CARDS	Card Number(s):	☐
	Expiration Date(s):	☐
	Recent Account Statement:	☐
	Login Credentials:	☐

ITEM	INFORMATION	
SOCIAL SECURITY CARD	Company Name:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
BIRTH CERTIFICATE	Company Name:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
PRENUPTUAL AGREEMENT(S)	Company Name:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
MARRIAGE CERTIFICATE(S)	Company Name:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
DIVORCE CERTIFICATE(S) & SETTLEMENT(S)	Box Number:	☐
	Keys:	☐
	Location:	☐
	Additional Information:	☐

ITEM	INFORMATION	
BANK/ CREDIT UNION INFORMATION	Important Information:	☐
AGREEMENT(S)	Important Information:	☐
LOGIN CREDENTIALS	Important Information:	☐

TITLE/DEED	INFORMATION	
REAL ESTATE	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Important Information:	☐
MOTOR VEHICLES	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Important Information:	☐
BOATS	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Important Information:	☐
AIRPLANES	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Important Information:	☐

ITEM	INFORMATION	
TAX RETURN(S) (LAST 3 YEARS OF RETURNS)	Vendor/Location:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
OTHER (W-2 FORMS, GIFT TAX RETURNS, ESTATE PLANNING DOCUMENTS, DEPRECIATION SCHEDULES, ETC.)	Important Information:	☐
401(K)	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
OTHER (403(B) PLANS, IRAS, ROTH IRAS, SIMPLIFIED EMPLOYEE PENSION (SEP) PLANS, SALARY REDUCTION SIMPLIFIED EMPLOYEE PENSION (SARSEP) PLAN, ETC.)	Important Information:	☐
INVESTMENT PORTFOLIOS (STOCKS, BONDS, MUTUAL FUNDS, BROKERAGE ACCOUNTS)	Important Information:	☐

ITEM	INFORMATION	
ELECTRICITY	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
GAS	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
WATER	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
TRASH	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
PHONE	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
CABLE	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
INTERNET	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐

ITEM	INFORMATION	
WILL	Location:	☐
	Copies of Previous Versions:	☐
	Created by (if applicable):	☐
	Additional Information:	☐
DECLARATIONS OF TRUST/ TRUST AGREEMENTS	Vendor/Location:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
NAME OF ATTORNEY/LAW FIRM THAT HELPED CREATE TRUST (IF APPLICABLE)	Company Name:	☐
	Contact Name:	☐
	Phone and Email:	☐
	Additional Information:	☐
BANK ACCOUNT(S) ASSOCIATED WITH THE TRUST	Company Name:	☐
	Contact Name:	☐
	Phone and Email:	☐
	Additional Information:	☐
POWER OF ATTORNEY INFORMATION (INCLUDE YOUR NAME AND PERSON APPOINTED)	Medical Power of Attorney:	☐
	Financial Power of Attorney:	☐
	Documentation	☐
	Attorney + Law Firm:	☐
	Additional Information:	☐

ITEM	INFORMATION	
ELECTRICITY	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
GAS	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
WATER	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
TRASH	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
PHONE	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
CABLE	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐
INTERNET	Vendor:	☐
	Website:	☐
	Login Credentials:	☐
	Additional Information:	☐

ITEM	INFORMATION	
MEDICAL RECORDS	Location:	☐
	Copies of Previous Versions:	☐
	Additional Information:	☐
MEDICAL DIRECTIVES	Location:	☐
	Attorney Information:	☐
	Key Requests:	☐
CURRENT PRESCRIPTIONS	Important Information:	☐
PAST PRESCRIPTIONS	Important Information:	☐

ITEM	INFORMATION	
TRANSCRIPTS	Location:	☐
	Copies of Previous Versions:	☐
	Additional Information:	☐
DIPLOMAS	Location:	☐
	Additional Information:	☐
PAST EMPLOYMENT	Important Information:	☐
MILITARY SERVICE DISCHARGE	Location:	☐
	Important Information:	☐

ITEM	INFORMATION	
EMAIL + SOCIAL MEDIA (EMAIL ADDRESSES, FACEBOOK, INSTAGRAM, LINKEDIN, OTHER SOCIAL MEDIA ACCOUNTS)	Login Credentials:	☐
RECURRING PAYMENTS (ONLINE SHOPPING, STREAMING SERVICES, GROCERY, MOBILE)	Important Information:	☐
SOCIAL SECURITY BENEFITS	Important Information:	☐
OTHER	Important Information:	☐