

**NET INCOME after deductions** (federal income tax (FIT), social security (SS), medicare & 401K Retirement Savings, Health Savings Account (HSA), Medical Insurance, Stock...)

Weekly (x 52)	Bi-Wkly (x 26)	Monthly (x 12)	Qrtly (x 4)	Yearly Net	FROM Whom? (job, social security, stock dividends ...)
			<b>total:</b>		

Life Insurance, Banks, Brokerages	Phone #	Policy/Savings Acct. #	Checking Acct. #	joint w/?

Burial location & plot #: \_\_\_\_\_ Location of: **Will** (& testimony with hand-written instructions for loved ones), **Power of Attorney & Living Will:** \_\_\_\_\_

# 2009 Financial Records for

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When I die...  
here's what my family needs to know  
about my finances....

