

ACCOUNT NUMBERS

CREDIT CARDS Your maximum liability if a credit card is stolen is \$50 per card. You have no liability for charges made after you report the card as lost or stolen.

Creditor:

Account number:

Credit line:

If lost, call this number:

Interest rate:

Date opened:

BANK ACCOUNTS If you lose your ATM card, you could lose all the money in your account plus your credit line. Call your bank within 48 hours and your maximum liability is \$50.

Institution:

Type of Account:

Account number:

Balance as of ___/___/___:

Branch of institution:

Address of institution:

Phone number:

Contact at institution:

INSURANCE

Life

Company:

Agent:

Phone number:

Account number:

Policy type:

Benefit Amount:

Beneficiary:

Disability

Company:

Agent:

Phone number:

Account number:

How long after disability does coverage take effect?

How long does the policy remain in effect?

What is the benefit amount?

Homeowners

Company:

Agent:

Phone number:

Policy number:

Description of policy:

Liability coverage

Collision coverage

Comprehensive coverage

Other features

Is the benefit adjusted to protect against inflation?

Health

Company:

Account number:

Deductibles:

Other features

What is the co-payment?

Is there a maximum out-of-pocket cost?

Is there an annual or lifetime cap on benefits?

Auto

Company:

Agent:

Phone number:

Policy number:

Description of policy:

Liability coverage

Collision coverage

Comprehensive coverage

Other features

Is there reimbursement for towing or car rental expenses?