

*Step 2 - Take Stock of the Present (continued)*

**3. Bank Accounts and Insurance**

**A. Bank accounts and safety deposit box**

Name and Location	Exact Names on Accounts	Number on Each Account	Amount	POD (Payable on Death)

*Person completing this step:*

*Date completed:*

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**B. Life insurance policies**

Company	How Owned (You, Spouse, or Joint)	Policy Number	Face Amount	Who is Insured? Who is the Beneficiary?	Cash Value & Any Outstanding Loan

*Person completing this step:*

*Date completed:*

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