Index Document for location of personal finances

There are 4 documents that you need to collate, these include the following:

* Overview Document- this is a list of all our accounts and credit cards, this is an excel file that I store in Dropbox
* Account Numbers Sheet – this is located in the fire safe box in the living room behind the sofa
* Account Password Sheet – this is located in my office safe
* Money Movement Sheet – this is located in google docs

The sheets are organized like this to keep the data separate so that if they are found a person cannot access our accounts easily, however in the event of my death you will need to put them together and start sorting through the accounts.

Each item will have a Reference number attached to it, such as: ‘BA1’ you will find this on each excel sheet so that you can line up the items, and have account access easily. If you do have trouble putting this together then you can also just contact the institution and attempt to access the accounts using my SSN.

Please note that some places, especially when it comes to credit cards, will have multiple accounts, so make sure you get them to check for more. Sometimes this will mean confirming both the Business Credit Cards and Personal Credit Card departments which are run separately.