



Create a Financial Inventory

Use this checklist below to help gather and organize the financial records, expenses, and other critical documents you need to manage an older adult's finances.

Financial Accounts

- Annuities
- Certificates of deposit
- Checking accounts
- Credit cards
- Investment accounts
- Retirement accounts
- Savings accounts

Living Expenses

- Cellphone/landline
- Electricity
- Gas
- Internet
- Cable TV
- Property taxes
- Rent
- Subscription services

Property

- Antiques
- Art
- Boat(s)
- Jewelry
- Rental property
- Primary residence
- Vehicle(s)
- Safe deposit box

Loans

- Auto
- Home equity
- Mortgage
- Personal
- Reverse mortgage
- Student

Insurance

- Auto
- Disability
- Homeowners
- Life
- Long-term care
- Medical
- Medicare
- Renters
- Umbrella

Income

- Annuities
- Business income
- Insurance payments
- Investment interest
- Dividends
- Military benefits
- Pension
- Retirement income
- Rental property
- Salary
- Social Security

Professional Services

- Accountant
- Attorney
- Insurance agent
- Financial advisor
- Doctor
- Dentist
- Landlord
- Property manager

Home Services

- House cleaner
- Plumber
- Handyman
- Gardener/landscaper
- Snow removal
- Home health aide
- Dog walker



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