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# Create A Financial Inventory



Use the checklist below from the ABA Foundation's [Safe Banking For Seniors Program](#) to help gather and organize the financial records, expenses, and other critical documents you need to manage an older adults's finances.

## Financial Accounts

- ☐ Annuities
- ☐ Certificates of deposit (CDs)
- ☐ Checking accounts
- ☐ Credit cards
- ☐ Investment accounts
- ☐ Retirement accounts
- ☐ Savings accounts

## Living Expenses

- ☐ Cell phone / land line
- ☐ 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

## Income

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

## Loans

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

## Home Services

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

## Professional Services

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

## Insurance

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

Visit [aba.com/Consumers](http://aba.com/Consumers) for more information on the ABA Foundation's [Safe Banking For Senior Program](#).

