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| **Name:**  **Cell: Email:** | | |
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| **Account** | **User Name** | **Password** |
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| **Email Accounts** | | |
| Hotmail |  |  |
| Gmail |  |  |
| Yahoo |  |  |
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| **Online Accounts & Web Portals** | | |
| Amazon |  |  |
| Netflix |  |  |
| Hulu |  |  |
| Cell Phone |  |  |
| Facebook |  |  |
| Broadband Backup |  |  |
| LinkedIn |  |  |
| SiriusXM Radio |  |  |
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| **Housing** | | |
| Mortgage |  |  |
| Maintenance |  |  |
| Taxes |  |  |
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| **Insurance** | | |
| Health Ins. |  |  |
| Dental Ins. |  |  |
| Life Insurance |  |  |
| Disability |  |  |
| Auto |  |  |
| Umbrella Liability |  |  |
| Credit Monitoring |  |  |
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| **Financial** | | |
| Checking |  |  |
| Savings |  |  |
| Money Market Acct. |  |  |
| PayPal |  |  |
| Venmo |  |  |
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|  |  |  |
| Mortgage |  |  |
| Auto Loan |  |  |
| Consumer Loans |  |  |
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| **Investments** |  |  |
| Brokerage Accounts |  |  |
| eTrade |  |  |
| Fidelity |  |  |
| Charles Schwab |  |  |
| Robinhood |  |  |
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| **Retirement Savings** | | |
| 401k |  |  |
| IRAs |  |  |
| Pensions |  |  |
| Annuities |  |  |
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| **Credit Cards** | | |
| Visa |  |  |
| Mastercard |  |  |
| American Express |  |  |
| Discover |  |  |
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| **Charge Cards – Specialty Retailers** | | |
| Macy’s |  |  |
| Target |  |  |
| The GAP |  |  |
| Walmart |  |  |
| Best Buy |  |  |
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| **College Savings** | | |
| 529 Plan |  |  |
| Brokerage Accounts |  |  |
| Savings Accounts |  |  |
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| **Debit Cards – Reloadable Cards** | | |
| Dunkin’ Donuts |  |  |
| Starbucks |  |  |
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| **Payroll & Work** | | |
| ADP or PayChex, etc. |  |  |
| Flexible Spending |  |  |
| Health Savings Acct. |  |  |
| Transit – Commuter |  |  |
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| **Household Accounts** | | |
| Electricity |  |  |
| Solar |  |  |
| Heating |  |  |
| Cable |  |  |
| Internet |  |  |
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| **Electronic Devices** | | |
| Laptop |  |  |
| iPad |  |  |
| Cell Phone |  |  |
| eReader – Kindle |  |  |
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| **Tax Accounts** | | |
| IRS |  |  |
| State |  |  |
| Local – Town & City |  |  |
| Social Security |  |  |
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| **Warranties & Maintenance Contracts** | | |
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| **Other Accounts & Important Information** | | |
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