

Know Your Numbers

It's critically important to have a handle on all of your financial accounts—account numbers, contact information, etc.—so that, in the case of an emergency, you have this information at your fingertips. But, be sure to keep this information in a secure location so that you don't become a victim of identity theft.

MAX Strategy Tip: Run your credit report from annualcreditreport.com and compare information such as account numbers, etc. Promptly challenge inaccuracies on your credit report.

Bank Account(s)					
Account Issuer	Account Number	Account Balance	Web URL	Phone	Username/ Password Hint

Retirement Account(s)					
Account Issuer	Account Number	Account Balance	Web URL	Phone	Username/ Password Hint

Mortgage(s)					
Account Issuer	Account Number	Account Balance	Web URL	Phone	Username/ Password Hint

Car Loan(s)					
Account Issuer	Account Number	Account Balance	Web URL	Phone	Username/ Password Hint

