

**BANK & BROKERAGE ACCOUNTS**

**Name(s) on Account:** \_\_\_\_\_

Account No.: \_\_\_\_\_ Name of Financial Institution: \_\_\_\_\_

Institution Contact: \_\_\_\_\_ Phone No.: \_\_\_\_\_ Email address: \_\_\_\_\_

Type of Account: Checking: \_\_\_\_\_ Savings: \_\_\_\_\_ Business: \_\_\_\_\_ Interest Bearing: \_\_\_\_\_ Brokerage: \_\_\_\_\_

Other (describe): \_\_\_\_\_ Joint Account: Yes \_\_\_\_\_ No \_\_\_\_\_

Those Authorized to Sign on Account: \_\_\_\_\_

Location of Account Checkbooks, Debit Cards, and Credit Cards: \_\_\_\_\_

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TAKING INVENTORY

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