Account Tracking Template

Keep all your financial accounts organized in one place with this comprehensive table.

Account Type	Institution/ Employer	Account Number	Contact Info/Website	Beneficiary Updated (Yes/No)	Other
Checking Account					
Savings Account					
401(k)/403(b)/Employer Plan					
IRA (Traditional/Roth)					
Life Insurance Policy					
Stock Plan/Other Investments					

Use this table to fill in the necessary details for each of your financial accounts. This will help ensure that all essential information is readily available and current. Remember to update the beneficiary information regularly to reflect any life changes.