My Choices

2.3A MY FINANCIAL ASSETS

baptist care sa

Keep this information confidential and store it in a secure location.

INSTRUCTIONS

TO COMPLETE 2.3A

Your financial assets include your cash, savings, deposits, cheque accounts and investments. Fill in worksheet with details of the institution holding the asset, the signatories and location of any records associated with each asset.

INSTITUTION *(e.g. bank, trust, credit union, pension plan, etc.)*	**BRANCH** *(Record address, contact details, phone, email)*	**ACCOUNT NUMBER** *(Record identification number)*	**ACCOUNT TYPE**	**SIGNATORIES**	**LOCATION OF RECORD/S** *(e.g. cheque book, statements, etc.)*