

Financial Organization

Financial Inventory

You want to get your financial life organized. This not only helps you to create a clear picture of your financial situation and make better decisions in the future, it will also help your spouse and family members to avoid having to make certain decisions in a crisis situation. Creating a financial inventory allows you to take charge of your financial information and having this important information located in one document helps you prepare for life's unexpected events.

A financial inventory template can be found on the Michigan Association of Certified Public Accountants website at www.micpa.org/resources/financial-literacy. This comprehensive tool, available in word and excel formats, will help you get started on the path towards financial organization.