



# Crimson Money Concepts

## Client Orientation Worksheet

Please do not include usernames, passwords, or account numbers. That information will never be required.

<b>Banking</b> (Checking, Savings, CDs, Money Market)	<b>Institution Name</b>	<b>Account Type</b>	<b>Online Access?</b>
			Y / N
			Y / N
			Y / N
			Y / N

<b>Mortgage/ Home Equity</b>	<b>Institution Name</b>	<b>Account Type</b>	<b>Online Access?</b>
			Y / N
			Y / N

<b>Credit Cards</b>	<b>Institution Name</b>	<b>Account Type</b>	<b>Online Access?</b>
			Y / N
			Y / N
			Y / N
			Y / N

<b>Other Loans</b> (auto, student, consolidation, etc)	<b>Institution Name</b>	<b>Account Type</b>	<b>Online Access?</b>
			Y / N
			Y / N
			Y / N
			Y / N

<b>Investment/ Retirement Accounts</b>	<b>Institution Name</b>	<b>Account Type</b>	<b>Online Access?</b>
			Y / N
			Y / N
			Y / N
			Y / N

<b>Other</b>	<b>Institution Name</b>	<b>Account Type</b>	<b>Online Access?</b>
			Y / N
			Y / N
			Y / N
			Y / N

**Notes**

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