



Crimson Money Concepts

Client Orientation Worksheet

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

Banking (Checking, Savings, CDs, Money Market)	Institution Name	Account Type	Online Access? Y / N
			Y / N
			Y / N
			Y / N
			Y / N
Mortgage/ Home Equity	Institution Name	Account Type	Online Access? Y / N
			Y / N
Credit Cards	Institution Name	Account Type	Online Access? Y / N
			Y / N
			Y / N
			Y / N
Other Loans (auto, student, consolidation, etc)	Institution Name	Account Type	Online Access? Y / N
			Y / N
			Y / N
			Y / N
Investment/ Retirement Accounts	Institution Name	Account Type	Online Access? Y / N
			Y / N
			Y / N
			Y / N
Other	Institution Name	Account Type	Online Access? Y / N
			Y / N
			Y / N
			Y / N
			Y / N

Notes
