

Checklist For Life

User Guidelines

On the following pages you will find Huntington's Checklist for Life. It has been developed to help you organize all of your financial information or your parents' financial information in one place.

As you complete and use this checklist, please remember to store it, as well as any documents you are using to complete it, in a secure location. Do not leave these forms or any other statements or documents lying around where others can see them.

For more information or to speak with a Huntington Investment Company representative, call toll-free 1-800-322-4600.

Date _____

Total Assets _____

Total Debt _____

Huntington Checklist For Life

MY MONEY

Total _____

Primary Bank _____

Address _____

Contact _____

Phone # _____

CHECKING ACCOUNTS

Financial institution _____

Account number _____

Average balance _____

Financial institution _____

Account number _____

Average balance _____

Financial institution _____

Account number _____

Average balance _____

SAVINGS ACCOUNTS

Financial institution _____

Account number _____

Current balance _____

Interest rate _____

Financial institution _____

Account number _____

Current balance _____

Interest rate _____

CDS

Financial institution _____

Account number _____

Current balance _____

Interest rate _____

Months until maturity _____

Financial institution _____

Account number _____

Current balance _____

Interest rate _____

Months until maturity _____

MONEY MARKET ACCOUNTS

Financial institution _____

Account number _____

Current balance _____

Interest rate _____

Financial institution _____

Account number _____

Current balance _____

Interest rate _____

OTHER

Type(s)

Current balance(s) _____

MY PROPERTY EQUITY

Total _____

HOME NO. 1

Location _____

Current Equity _____

Remaining Debt? Yes No

HOME NO. 2

Location _____

Current Equity _____

Remaining Debt? Yes No

VEHICLES

Type Boat Plane Classic Auto

Current Equity _____

Remaining Debt? Yes No

OTHER

Type(s) _____

Current Equity _____

Remaining Debt? Yes No

MY LOANS

Negative Total _____

Mortgages

HOME NO. 1

Location _____

Mortgage Lender _____

Account Number _____

Interest Rate _____

Term _____

Years Remaining _____

Current Debt _____

HOME NO. 2

Location _____

Mortgage Lender _____

Account Number _____

Interest Rate _____

Term _____

Years Remaining _____

Current Debt _____

HOME EQUITY LOANS

Location _____

Mortgage Lender _____

Account Number _____

Interest Rate _____

Term _____

Years Remaining _____

Current Debt _____

Vehicle Loans

VEHICLE NO. 1

Vehicle _____

Lender _____

Account Number _____

Interest Rate _____

Term _____

Years Remaining _____

Current Debt _____

VEHICLE NO. 2

Vehicle _____

Lender _____

Account Number _____

Interest Rate _____

Term _____

Years Remaining _____

Current Debt _____

OTHER VEHICLES

Type of Vehicle Boat Plane Classic Auto

Lender _____

Account Number _____

Interest Rate _____

Term _____

CREDIT BALANCES

Credit Lender _____

Interest Rate _____

Current Debt _____

Credit Lender _____

Interest Rate _____

Current Debt _____

OTHER

Type(s)

Current Debt _____

MY INVESTMENTS

Total _____

My Workplace Investments

RETIREMENT PLANS

401/403 EMPLOYER PLANS

Account Name _____

Account Number _____

Current Assets _____

Beneficiary _____

PENSION

Account Name _____

Account Number _____

Current Assets _____

Beneficiary _____

STOCK OPTIONS

Account Name _____

Account Number _____

Current Assets _____

Beneficiary _____

EMPLOYER INSURANCE COVERAGE

Insurance Provider _____
Type of Insurance _____
Account Number _____
Beneficiary _____
Pays Upon Death Disability
Total Payout _____

OTHER

Type(s)

Current balance(s) _____

My Personal Investments

RETIREMENT

Account Type _____
Account Name _____
Account Number _____
Beneficiary _____
Current Assets _____

Account Type _____
Account Name _____
Account Number _____
Beneficiary _____
Current Assets _____

EDUCATION

Account Type _____
Account Name _____
Account Number _____
Beneficiary _____
Current Assets _____

Account Type _____
Account Name _____
Account Number _____
Beneficiary _____
Current Assets _____

INDIVIDUAL STOCKS

Stock Name _____
Account Number _____
Beneficiary _____
Current Assets _____

Stock Name _____
Account Number _____
Beneficiary _____
Current Assets _____

SAVINGS BONDS

Account Name _____
Account Number _____
Interest Rate _____
Years until maturity _____

MY INSURANCE PROTECTION

LIFE

Insurance Provider _____
Account Number _____
Beneficiary _____
Total Payout _____

DISABILITY

Insurance Provider _____
Account Number _____
Beneficiary _____
Total Payout _____

PROPERTY/CASUALTY

Item Insured _____
Insurance Provider _____
Account Number _____
Amount Insured _____

Item Insured _____
Insurance Provider _____
Account Number _____
Amount Insured _____

OTHER

Type(s)

Total Coverage _____

MY PROFESSIONALS

BANKER

Name _____
Institution _____
Phone Number _____

FINANCIAL ADVISOR

Name _____
Institution _____
Phone Number _____

ACCOUNTANT

Name _____
Institution _____
Phone Number _____

ATTORNEY

Name _____
Institution _____
Phone Number _____

PRIMARY CARE PHYSICIAN

Name _____
Institution _____
Phone Number _____

MY SAFE DEPOSIT BOX

Financial Institution _____

Account Number _____

Location _____

Location of key _____

Contents

[Empty box for safe deposit box contents]

Financial Institution _____

Account Number _____

Location _____

Location of key _____

Contents

[Empty box for safe deposit box contents]

MY ARRANGEMENTS

Prearrangements

FUNERAL HOME

Name of Facility _____

Contact _____

Phone Number _____

FUNERAL INSURANCE

Insurance Provider _____

Account Number _____

Beneficiary _____

Total Payout _____

BURIAL PLOT

Name of Cemetery _____

Location _____

Contact _____

Phone Number _____

My Estate

EXECUTOR

Name _____

Phone Number _____

HEIRS AND CONTACTS

[Empty box for heirs and contacts information]

What to do with this information

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