



Spouse Family Financial Affairs Questionnaire

Print out two copies of this questionnaire and have each spouse fill it out. Typically one spouse does more of the bills/finances so this is an exercise to see what situation their spouse would be in should something happen to them.

1. Do you have a will?
2. Do you know where a copy of your will is located?
3. Do you have life insurance?
4. Do you know how much life insurance you have on you and your spouse?
5. Do you know where your life insurance policies are located?
6. Do you know what company provides your home owner's insurance?
7. Do you know where your home owner's insurance policy is located?
8. Do you know what company provides your automobile insurance?
9. Do you know where your automobile insurance policies are located?
10. Do you have any other insurance policies?

11. How many bank accounts does your family have?
12. What institutions do you have bank accounts at?
13. Do you know how to log in to all of your bank accounts online?
14. Do you know your bank account numbers and/or how to find them in your home?
15. Do you know how much money is in your general checking/savings accounts?
16. Do you know which bills are auto-paid out of your checking account?
17. Do you know which bills need to be paid with checks each month?
18. Do you know the balances on all of your credit cards and loans?
19. Do you know all of your open credit accounts and where they are located?
20. Do you know what your credit scores are?

21. Do you have any retirement accounts?
22. Do you know how much money is in your retirement accounts?
23. Do you know how to access your retirement accounts online?
24. Do you know how much you are currently contributing to your retirement monthly?
25. Do you have other investment accounts, stocks, etc.?
26. Do you know how to access your other investment accounts?
27. Do you know your family's net worth?

Once you have answered these questions, give this paper to your spouse and have them put together a document for you that includes all of the information that you didn't know. How did this make you feel? Would you be in a hard situation if your spouse died? Things will be hard enough in that situation without stressing about finances/bills as well.