

# RFIA - Financial Institution Accounts Screen

Resources Income Summary

Resources

Select

Financial Accounts

### Financial Institution Account

\* Indicates required information

**\* Financial Institution Information**  
Use Search Financial Institutions or Select from Favorites to add or change the Financial Institution

Name --

Address --

Search Financial Institutions OR Select from Favorites

---

**Account Information**

\*Account type --

Account number

Dedicated account

Collective account or master sub-account ?

**Account title**  
(500 characters maximum)

Characters remaining: 500

\*Co-Owned  Yes  No  Unknown

Co-Owner	Date From (mm/yyyy)	Date To (mm/yyyy)	Actions
Add Co-Owner			

Earns interest

Set aside for burial

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**Values**  
Alleged Value or Verified Value is required.

Date From (mm/yyyy)	Date To (mm/yyyy)	Alleged Value (\$)	Verified Value (\$)	Excluded Amount (\$)	Unknown	Countable Amount (\$)	Actions
					<input type="checkbox"/>		Delete

+ Show person remarks  
No remarks

+ Show file documentation notes  
No notes

Add Another Clear Page Delete

Co-Owner

\* Co-Owner Name

\* Date From   Unknown  
mm/yyyy

\* Date To   Unknown  
mm/yyyy

OK Cancel

- Resources
- Select
- Financial Accounts

### Financial Institution Account

\* Indicates required information

#### \* Financial Institution Information

Use Search Financial Institutions or Select from Favorites to add or change the Financial Institution

Name **LIBERTY BANK**  
 Address **174 WASHINGTON AVE  
 NORTH HAVEN, CT 06473**

OR

#### Account Information

\*Account type

Account number

- Dedicated account
- Collective account or master sub-account ?

Account title  
 (500 characters maximum)

Mr. & Mrs.

Characters remaining: 491

\*Co-Owned  Yes  No  Unknown

Co-Owner	Date From (mm/yyyy)	Date To (mm/yyyy)	Actions
First Middle Last - Other	01/2015	Continuing	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

- Earns interest
- Set aside for burial

#### Values

Alleged Value or Verified Value is required.

Date From (mm/yyyy)	Date To (mm/yyyy)	Alleged Value (\$)	Verified Value (\$)	Excluded Amount (\$)	Unknown	Countable Amount (\$)	Actions
01/2015	Continuing <input checked="" type="checkbox"/>	100.00		50.00	<input type="checkbox"/>	\$50.00	<input type="button" value="Delete"/>
					<input type="checkbox"/>		<input type="button" value="Delete"/>

\*Exclusion reason

[+ Show person remarks](#)  
 No remarks

[+ Show file documentation notes](#)  
 No notes