INFORMATION READINESS: START WITH YOUR FINANCIAL PICTURE

Your Financial Information Inventory

*If someone had to step into your shoes tomorrow, could they see what you **own**, what you **owe** and **what protects you**?*

What you own

- Bank and investment accounts
- Registered accounts, pensions
- Home and other property, vehicles
- Digital assets (crypto, points, etc.)
- Business interests, RSUs/options
- Valuables and collectibles

What you owe

- Mortgage
- Lines of credit and loans
- Credit cards
- Support obligations
- Tax installments or arrears
- Anything co-signed or guaranteed

What protects you

- Life insurance
- Disability and critical illness
- Home and auto policies
- Workplace benefits

HOW TO RECORD IT *One document. One row per item.*

Use the worksheet on the next page. Add one row for each account, policy, property, debt or other item.

This inventory is a starting point. It does not cover all of the documents, instructions, responsibilities or access someone may need to step into your shoes. If you record passwords or other credentials here, store this document somewhere genuinely secure.

Estate Kit helps you bring the full picture together and keep it current. Visit estatekit.com/carp.

Your Financial Information Inventory

Item Type	Institution/ Provider	Acct/Policy # (Last 4 digits)	Advisor/ Contact	Ownership Whose Name It's In	Where Access Lives (app, portal, password manager)	Where to Find Documents/ Statements

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