

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)
- Business interests, RSUs / options
- Valuables and collectibles

What you owe

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

What protects you

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

WHAT COMPLETED ROWS LOOK LIKE

Item type	Institution / provider	Acct / policy # last 4 digits	Advisor / contact	Ownership whose name it is in	Where access lives app, portal, password manager	Where to find documents statements, policies
RRIF	Birchfold Investments	4417	J. Mehta, 416-555-0148	Mine	Bank app, password manager	Statements by email; binder in study
Mortgage	Northgate Credit Union	8102	Branch, 905-555-0132	Joint with Dana	Online banking	Renewal letters in the study
Life insurance	Maple Shield Insurance	2290	R. Okafor, broker, rokafor@example.com	Mine, Dana is beneficiary	Paper policy only	Original in the fire safe

- 1 **Print the worksheet.** Two blank pages follow this one, with room for 34 entries in total. Print more if you need them.
- 2 **Give every item its own row.** One line per account, policy, property or debt. Work through one category at a time.
- 3 **Date it, and revisit it once a year.** Accounts close, advisors change and policies renew. A list nobody updates stops being true.

This inventory is a starting point. It does not cover every document, instruction, responsibility or access someone may need in order to step in. If you record account details here, keep the completed pages somewhere secure.



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