

treasure map

Name:



February 23, 2021

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## Current Financial Monthly Management

## *This section is for your monthly finances, create a simple how to guide on your current financial monthly management.*

## Bank Accounts

## *This section is for your bank accounts and associated details, like direct links to where your account can be found.*

## Investment / Personal Loans

## *This section is for your investment/personal loans, and associated details.*

## Mortgage

## *This section is for your mortgage, and associated details, like which financial service they are with and current balance.*

## Share Portfolio

*This section is if you have a share portfolio, and associated details.*

## Insurance

*This section is for insurance policies, and associated details, like what are they for and the cost of them.*

## Life Insurance

*This section is if you have life insurance, and associated details, like the amount insured and what circumstances it will cover.*

## Superannuation Fund Details

*This section is for your superannuation fund details, and associated details, like different accounts.*

## Professional Advisers

## *This section is for the contact details of professional advisors you use, like lawyers that possess a copy of your will.*

##  10. Executor / Guardians / Power of Attorney

*This section is for the contact details of your selected Executors, Guardians or Power of Attorney.*

##  11. Tax File Numbers

*This section is for your tax file numbers.*

##  12. Last Pass Password Manager

*This section is for if you use a password manager system, like last pass to store your passwords.*

##  13. Company Details / Employer Details

*This section is for employer details or company details.*