



SHEsorganized or.....is SHE?

This financial journey will walk you through the steps to help you find financial independence, feel empowered and gain control of your finances.

Let's get started.....getting organized is step 1- the importance of this step is to be sure all of your important documents are in one location. This will save you time, help you feel in control and in the event that someone else has to deal with your personal affairs it will be accessible. It doesn't matter, what you use, a box or cabinet (download our SHEorganizer pdf on our Exercises page) is but the following documents should be there and updated/filed as new documents arrive.

- Will/Power of Attorney/Representative Agreement
- Family Trust Documents
- Previous Year's Tax Returns
- Previous Year's CCRA Notice of Assessment
- Retirement Accounts – RRSP's/Company Pension Plan Statements
- Non-Registered Investments
- Stock Portfolio Statements
- Annuity/RRIF payments
- Savings Accounts
- Investment Accounts
- Canada Pension Plan Statements
- Bank Accounts – chequing/savings/household
- Children's Bank Accounts
- Children's RESP's
- Emergency Fund
- Tax Free Savings Account (TFSA)
- Mortgage Documents/Annual Statements
- Current Statement for Outstanding Debts (Credit cards, Credit Line)
- Real Estate Documents
- Property Tax Assessment
- Property Insurance
- Life Insurance Documents/Annual Statements
- Insurance – Disability/Critical Illness/Long Term Care
- Employee Group Benefits Booklet
- Personal Spending and Savings Worksheet