



Your Financial Summary Checklist

for preparing Financial Summary data entry

- To simplify data entry, see the Handy Notes below before you start.
- This will make entering information easy, simple and quick.

Tip: destroy this sheet once used as a data entry aid.

Person 1

(list for Person 2 on next page)

First name: _____ Family name: _____

Handy notes:

- When entering your **Financial Summary** data in your Now Sorted app software, simply use the drop-down menu to select the relevant items you need.
- You can make multiple entries for each 'type' of asset or liability.
- Your **Crucial Facts Report & Directory** will print out a summary of everything you enter.
- While some amounts might change frequently (e.g. bank balances) others will fluctuate gradually (property).
- Either way, you'll find it takes just seconds to update changes ... try it.

Data entry tab > Financial Summary

Item	Type	Amount \$	Brief description	Location	Date entered
1	Cash at bank				__/__/2__
2	Cash in pension/super fund				__/__/2__
3	Residence				__/__/2__
4	Investment property				__/__/2__
5	Pension/super fund investment				__/__/2__
6	Non Pension/super fund investment				__/__/2__
7	Loans receivable				__/__/2__
8	Vehicle				__/__/2__
9	Collectibles as assets				__/__/2__
10	Non-marketable-asset				__/__/2__
11	All debt as liability				__/__/2__

Your notes as necessary:

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Support: support@nowsorted.com



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Person 2

(list for Person 1 on first page)

First name: _____ Family name: _____

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Joint Persons

(list for Persons 1 & 2 on previous pages)

First name: _____ Family name: _____

First name: _____ Family name: _____

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