

WHAT'S IN AN IMPORTANT DOCUMENT FILE?

Gather up all important documents and create an Important Document file. You should be able to easily access this in case of emergency.

The Important Document File should include the following documents as an example:

- Blue Data Collection Form
- Strategic Spending Plan
- Tax Returns for 3 Years including Notice of Assessment
- Superannuation Statements for 3 Years
- Bank Statements on Savings/Investment Accounts
- Credit Card Statements
- Loan Documents
- Share Holder Dividend Statements
- Records of Crypto Currency
- Mortgage Documents or Land Title Documents
- Insurance Policies – home, contents, vehicle, life etc
- Vehicle Registration and Ownership Documents
- Legal Documents that are current – Birth Certificates, Marriage Certificates, Power of Attorney, Wills, Child Custody Agreements etc
- Business Agreements and Company Documents
- Any documents you feel are important to you

Keep your originals filed somewhere in a safe place at home or in an online storage space (cloud) and know that the documents will need to be upgraded from time to time as they become out of date.

For your meetings with Roy, you will need to collect from the above a sample of information. He doesn't need all the pages, just summary pages.

As a guide:

- Most recent Blue Data Collection Form
- Most recent Strategic Spending Plan
- Income Tax Notice of Assessment for 3 years (only full returns required if you have a tax issue)
- Summary page of most recent Superannuation Statement
- Summary page of Loan Documents
- Summary page of Share Holder Dividend Statements
- Summary page of Crypto Currency
- Summary page of Mortgage Documents or Land Title Documents
- Summary page of Life Insurance
- Summary of Business Agreements and Company Documents
- Any documents that pertain to questions you have for Roy

Ahead of your program or meeting with Roy, email the Important Documents to support@onelife.com.au. We would really appreciate it if you could name the files with the contents so we know what is what at a glance

If using an online file transfer or sharing service, please ensure the link is shared with the above email address. Please remove any passwords from shared files.