



Your Documents/Location Checklist

for preparing Document/Location 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 Documents/Location data in your Now Sorted software, if you don't see a particular document type listed, simply 'type over' any name in the list to add what you want to the list.
- Once assembled, scan the documents you wish to upload and make linking (attaching) them very easy.
- Once done, you should destroy this hard copy list ... your entered data will be safely encrypted in the system.

Data entry tab > Documents/Location

Item	Document	Location of original	Date entered in NS	Scanned	Linked
1	Appointment of Enduring Guardian		___/___/2___	Y / N	Y / N
2	Certificates (Birth, Marriage, etc)		___/___/2___	Y / N	Y / N
3	Credit cards		___/___/2___	Y / N	Y / N
4	Driving licence		___/___/2___	Y / N	Y / N
5	Insurance policies		___/___/2___	Y / N	Y / N
6	Investment receipts		___/___/2___	Y / N	Y / N
7	Mortgage documents		___/___/2___	Y / N	Y / N
8	Power of Attorney		___/___/2___	Y / N	Y / N
9	Share/bond certificates		___/___/2___	Y / N	Y / N
10	Super/Pension statements		___/___/2___	Y / N	Y / N
11	Tax records		___/___/2___	Y / N	Y / N
12	Title deeds		___/___/2___	Y / N	Y / N
13	Will		___/___/2___	Y / N	Y / N
14	Other 1		___/___/2___	Y / N	Y / N
15	Other 2		___/___/2___	Y / N	Y / N
16	Other 3		___/___/2___	Y / N	Y / N



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Person 2

(list for Person 1 on previous page, for Joint Persons on next page)

First name: _____ Family name: _____

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4	Driving licence		___/___/2___	Y / N	Y / N
5	Insurance policies		___/___/2___	Y / N	Y / N
6	Investment receipts		___/___/2___	Y / N	Y / N
7	Mortgage documents		___/___/2___	Y / N	Y / N
8	Power of Attorney		___/___/2___	Y / N	Y / N
9	Share/bond certificates		___/___/2___	Y / N	Y / N
10	Super/Pension statements		___/___/2___	Y / N	Y / N
11	Tax records		___/___/2___	Y / N	Y / N
12	Title deeds		___/___/2___	Y / N	Y / N
13	Will		___/___/2___	Y / N	Y / N
14	Other 1		___/___/2___	Y / N	Y / N
15	Other 2		___/___/2___	Y / N	Y / N
16	Other 3		___/___/2___	Y / N	Y / N

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Joint Persons

(list for Persons 1 and 2 on adjacent pages)

First name: _____ Family name: _____
 First name: _____ Family name: _____

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