

A WIRE CONVERSATION KIT

My Money Organiser

All your important information in one place



 **wire**
any woman **any** issue

We hope this organiser helps you to feel empowered and in control of your financial situation.

It should also give you the information you need to help you take stock of your financial information, have important information to hand if something goes wrong or if others need to manage your finances if you can't, temporarily or through permanent, profound disability or death.

For the My Money Organiser to continue to support you to be in control of your money, it needs to be up to date. You might like to review and make changes to it when things change, once a year or once every few months.

Please consider that once filled out, this document will contain lots of important and private information. Where and how you store it, and who you tell, is important to think about before you fill it out. We also encourage you to read the "My Money Guide" before filling out this organiser.

You may like to use this as an original and photocopy pages before you fill them in. That way, as your circumstances change, you can keep photocopying pages and updating your records. This document can also be downloaded from WIRE's website www.wire.org.au



Personal Information

Given Names

Surname

Date of Birth

Passport Number

Address

Suburb

State

Post Code

Centrelink Number & Customer Reference Number (CRN)

Centrelink Benefit Name

My Aged Care Client Number

NDIS Number

Tax File Number

Australian Business Number (ABN)

My Gov Username & Password

Driver's Licence Number

Vet Affairs Pension Number

2 Important documents

Keeping track of where everything is kept can be tricky. Original documents and important files might be kept in a filing cabinet, safe, deposit box, a solicitor's office or "a safe place". Sometimes safe places can be easily forgotten or can't be found by friends and family if you are not able to tell them where your safe place is. This might help you keep track.

Date	Item	Location
	Birth Certificates	
	Passport	
	Marriage Certificate	
	Medicare Card	
	Pension/ Concession Card	
	My Aged Care package	
	NDIS Plan	
	Banking documents	

Date	Item	Location
	Loan documents	
	Investment documents	
	Insurance Policies	
	Land/Property titles	
	Rental agreement	
	Superannuation papers	
	Power of Attorney	
	My Will – Original	
	Funeral documents	
	Online documents	
	Other documents	

3 Housing

If you rent

Property manager name

Phone

Rent per month

What is included in this amount?

Rent assistance, how much per month?

Have you paid a bond and for how much?

If you own

Do you own the property outright?

(If you have a mortgage, also complete the section on debts relating to mortgages)

Do you have additional housing costs?

Rates

Body Corporate fees



Professionals you work with

Financial counsellor

Name

Phone

Organisation

Address

Other Details

My aged care service provider

Name

Phone

Organisation

Address

Other Details

NDIS local area coordinator

Name

Phone

Organisation

Address

Other Details

Support Coordinator

Plan Manager

Investment manager

Name

Phone

Organisation

Address

Other Details

Property/rental manger

Name

Phone

Organisation

Address

Other Details

Housing worker

Name

Phone

Organisation

Address

Other Details

Solicitor

Name

Phone

Organisation

Address

Other Details

Accountant

Name

Phone

Organisation

Address

Other Details

Financial planner

Name

Phone

Organisation

Address

Other Details

ASSETS

5 Bank accounts

This may include your personal accounts and other accounts you have a legal connection to (e.g. a joint account or the accounts of a spouse).

Saving/Debit

1	Bank & Branch	Account name	BSB & Account number
	Connected cards	Online Access	Who has access
2	Bank & Branch	Account name	BSB & Account number
	Connected cards	Online Access	Who has access
3	Bank & Branch	Account name	BSB & Account number
	Connected cards	Online Access	Who has access

Transaction/Everyday

1	Bank & Branch	Account name	BSB & Account number
	Connected cards	Online Access	Who has access
2	Bank & Branch	Account name	BSB & Account number
	Connected cards	Online Access	Who has access
3	Bank & Branch	Account name	BSB & Account number
	Connected cards	Online Access	Who has access

Cheque

1	Bank & Branch	Account name	BSB & Account number BSB: A/C:
	Connected cards	Online Access Y / N	Who has access
2	Bank & Branch	Account name	BSB & Account number BSB: A/C:
	Connected cards	Online Access Y / N	Who has access
3	Bank & Branch	Account name	BSB & Account number BSB: A/C:
	Connected cards	Online Access Y / N	Who has access

Term Deposit

1	Bank & Branch	Account name	BSB & Account number
	Connected cards	Online Access	Who has access
2	Bank & Branch	Account name	BSB & Account number
	Connected cards	Online Access	Who has access
3	Bank & Branch	Account name	BSB & Account number
	Connected cards	Online Access	Who has access

Other

1	Bank & Branch	Account name	BSB & Account number BSB: A/C:
	Connected cards	Online Access Y / N	Who has access
2	Bank & Branch	Account name	BSB & Account number BSB: A/C:
	Connected cards	Online Access Y / N	Who has access
3	Bank & Branch	Account name	BSB & Account number BSB: A/C:
	Connected cards	Online Access Y / N	Who has access



6 Superannuation

If you have more than one superannuation account, you might consider merging them to minimise the fees you pay and to get the most return on your investment. Here is a website to help you find any lost super:

<https://australiansuperfinder.com.au>

If you have a partner through marriage or a de facto relationship you might also list their superannuation details here as it is often considered part of the property in a relationship.

Fund name:

Account name

Membership number

Voluntary contributions

Do I pay fees?

\$ _____ per

Y / N \$

Is death and disability
insurance included?

Is income insurance
included?

Y / N

Y / N

Fund name:

Account name

Membership number

Voluntary contributions

Do I pay fees?

\$ _____ per

Y / N \$

Is death and disability
insurance included?

Is income insurance
included?

Y / N

Y / N

Fund name:

Account name

Membership number

Voluntary contributions

Do I pay fees?

\$ ----- per

Y / N \$

Is death and disability
insurance included?

Is income insurance
included?

Y / N

Y / N

Fund name:

Account name

Membership number

Voluntary contributions

Do I pay fees?

\$ ----- per

Y / N \$

Is death and disability
insurance included?

Is income insurance
included?

Y / N

Y / N

Fund name:

Account name

Membership number

Voluntary contributions

Do I pay fees?

\$ ----- per

Y / N \$

Is death and disability
insurance included?

Is income insurance
included?

Y / N

Y / N



7 Business interests

You may own your own business, own a portion of a business or you may have a stake in a business through marriage or a de facto relationship.

Business name:

Business structure

Business Value

\$

Accountant name

Phone

Solicitor name

Phone

Owner/Shareholder

% owned

1

2

3

Business name:

Business structure

Business Value

\$

Accountant name

Phone

Solicitor name

Phone

Owner/Shareholder

% owned

1

2

3



Investments

Investments may include stock or shares, bonds and other investments.

	Organisation	Description	Value \$	Maturity date
1				
2				
3				
4				
5				
6				
7				
8				



9

Assets

Assets may include real estate, cars, art, jewellery or other items.

	Item	Location	Name/s on title	Value \$	Loaned against
1					
2					
3					
4					
5					
6					
7					
8					

DEBTS

These come in many forms and can include debts to family and friends or mortgages, fines, credit cards and a variety of loans. You may also like to include the details of any loans you have guaranteed.



10 Debts

For:

Owed to

Connected products

Secured

Y / N

Amount owing

Interest rate

\$

Repayments

Online Access

\$

per

Y / N

Who is liable

Who has access

For:

Owed to

Connected products

Secured

Y / N

Amount owing

Interest rate

\$

Repayments

Online Access

\$

per

Y / N

Who is liable

Who has access

For:

Owed to

Connected products

Secured

Y / N

Amount owing

Interest rate

\$

Repayments

Online Access

\$ per

Y / N

Who is liable

Who has access

For:

Owed to

Connected products

Secured

Y / N

Amount owing

Interest rate

\$

Repayments

Online Access

\$ per

Y / N

Who is liable

Who has access

OTHER COSTS



Utilities & ongoing bills

Usually these bills are paid on an ongoing basis, might include a fixed term contract and are services that are used by most people. To check your electricity and gas prices against other deals you can go to compare.energy.vic.gov.au

Electricity

Company

Service Address

Customer Number

Account Number

Paid automatically by direct debit

Y / N

Gas

Company

Service Address

Customer Number

Account Number

Paid automatically by direct debit

Y / N

Water

Company

Service Address

Customer Number

Account Number

Paid automatically by direct debit

Y / N

Home Phone

Company

Service Address

Customer Number

Account Number

Paid automatically by direct debit

Y / N

Internet

Company

Service Address

Customer Number

Account Number

Paid automatically by direct debit

Y / N

Mobile Phone

Company

Service Address

Customer Number

Account Number

Paid automatically by direct debit

Y / N

12 Financial obligations

Many people have substantial financial obligations which are not otherwise covered in this document. These may be ongoing or for a set time and can include things like donations, school fees, support paid to extended family, union dues and many more.

	Obligation	To	For	amount \$	How often	Paid automatically by direct debit
1						Y / N
2						Y / N
3						Y / N
4						Y / N
5						Y / N
6						Y / N

13 Insurance

Life

Provider

Member/account number

Policy number

Cost

Is it connected to another product

\$ per

Y / N

Cover details

Income

Provider

Member/account number

Policy number

Cost

Is it connected to another product

\$ per

Y / N

Cover details

Building

Provider

Member/account number	Policy number
Cost	Property address
\$ per	
Cover details	

Building (any additional property)

Provider

Member/account number	Policy number
Cost	Property address
\$ per	
Cover details	

Contents

Provider

Member/account number

Policy number

Cost

Property address

\$ per

Cover details

Car

Provider

Car Registration

Member/account number

Policy number

Cost

Is it connected to another product

\$ per

Y / N

Cover details

Health

Provider

Member/account number	Policy number
Cost	People covered by policy
\$ per	
Cover details	

Other

Provider

Member/account number	Policy number
Cost	Notes
\$ per	
Cover details	

My Notes

any woman **any issue**

Call us:



1300 134 130

Weekdays 9am to 5pm

(mobile costs may vary)



Visit us:

372 Spencer Street,

West Melbourne 3003

Weekdays 9.30am to 4.30pm



Contact us:

support@wire.org.au



Chat online, download resources
and book into events:

[wire.org.au](https://www.wire.org.au)

(Chat weekdays only)



Stay up to date:

facebook.com/wirewomensinformation

twitter.com/wirewomensinfo

We acknowledge the First Nations people
as the traditional custodians of the lands and
waters throughout Australia.

WIRE is a service for women,
nonbinary and gender-diverse people.



WIRE acknowledges
the support of the
Victorian Government



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