READYWHEN

QuickStart Guide

How to use: Assets

November 2021
Version 2.0

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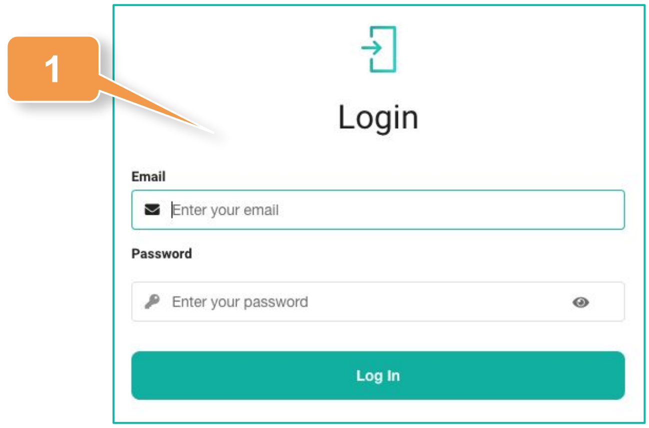
Logging in and Navigation

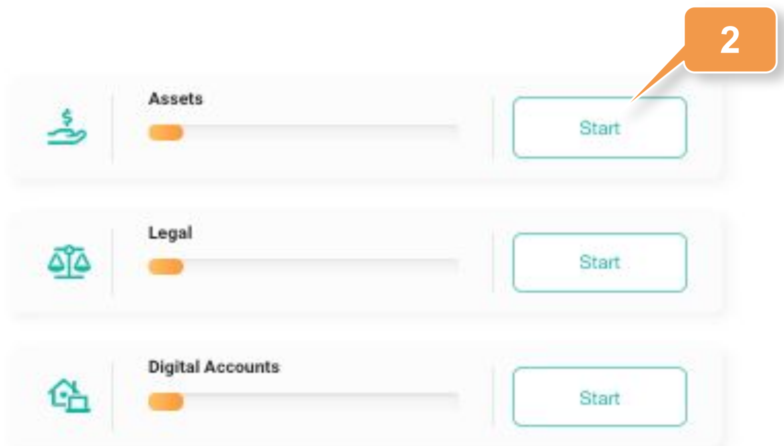
1. Login to the ReadyWhen application at: http://app.readywhen.ca

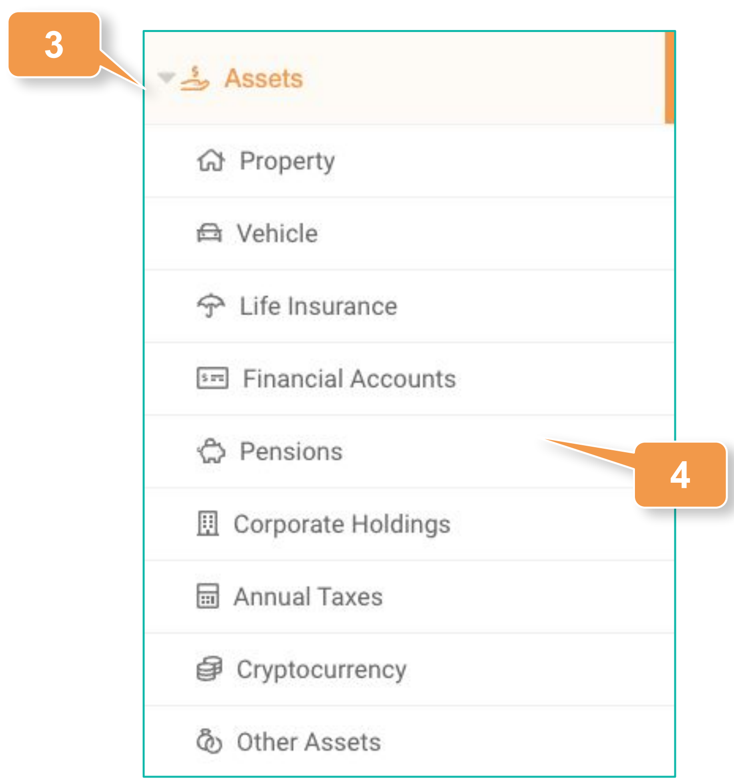
2. Click the **Start** button for the relevant area of your dashboard to open it.

3. Alternatively, expand the relevant area in the left side navigation by clicking the right pointing triangle.

4. From the expanded list, click on the area you would like to open.







Adding a Property

1. Click on **Property** in the left hand navigation or **Add Property** from the Assets Overview page.

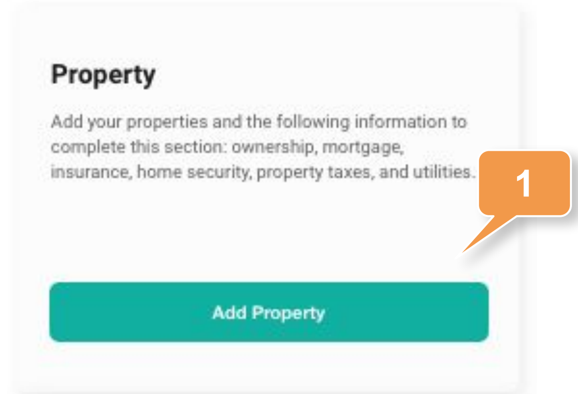
2. Click **Add Property**.

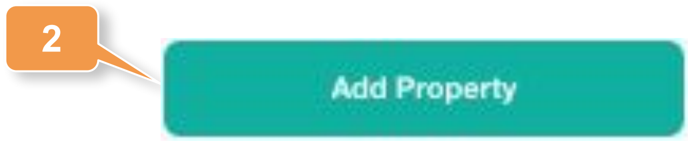
3. Add a title for this property.

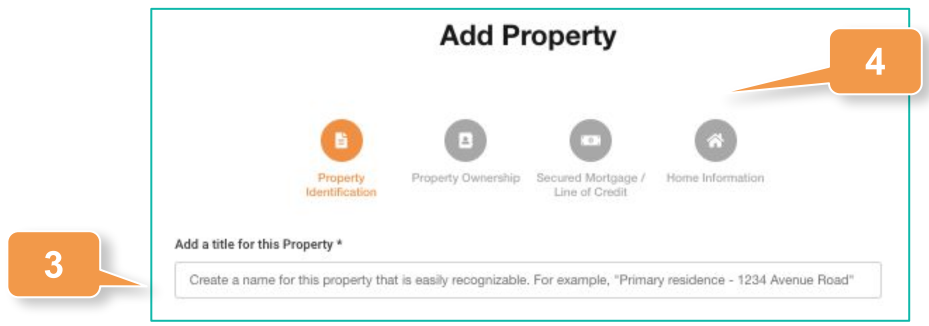
4. Using the **Next** button at the bottom of the screen to proceed, complete all relevant areas across each of the four property sections.

5. Where available, upload any digital versions of property documentation.

6. Click **Save** at the end to complete the record.







Adding a Vehicle

1. Click on **Vehicle** in the left hand navigation or **Add Vehicle** from the Assets Overview page.

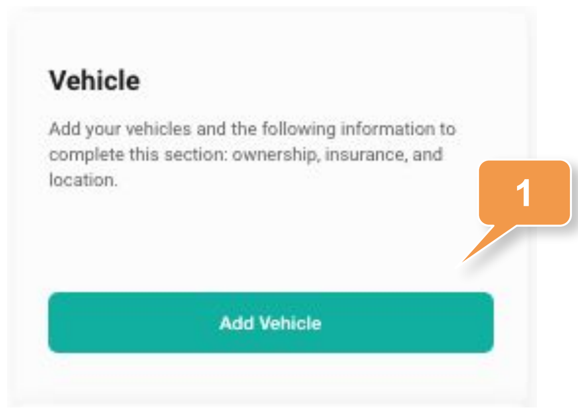
2. Click **Add Vehicle**.

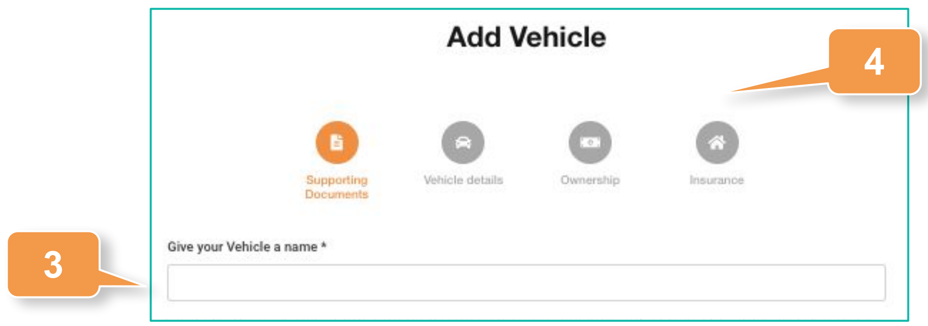
3. Add a title for this property.

4. Using the **Next** button at the bottom of the screen to proceed, complete all relevant areas across each of the four vehicle sections.

5. Where available, upload any digital versions of vehicle documentation.

6. Click **Save** at the end to complete the record.





Adding Life Insurance

1. Click on **Life Insurance** in the left hand navigation or **Add Life Insurance** from the Assets Overview page.

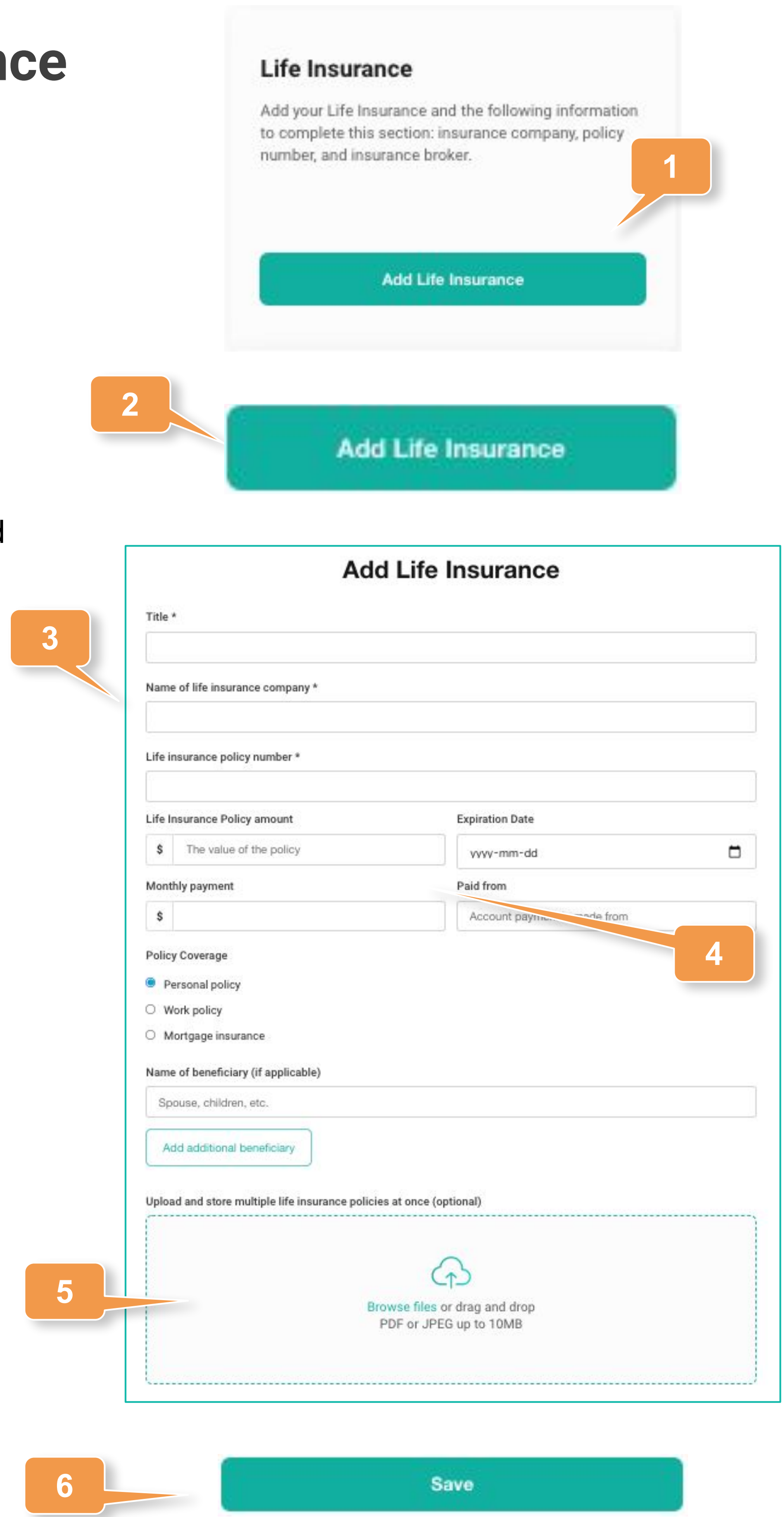
2. Click **Add Life Insurance**.

3. At a minimum, add the insurance title, name of the life insurance company, and the life insurance policy number.

4. Add all other relevant insurance information such as policy amount, coverage type, beneficiaries and agent information.

5. Upload a digital version of the policy.

6. Click **Save** at the bottom to complete the record.



Adding Financial Accounts

1. Click on **Financial Accounts** in the left hand navigation or **Add Financial Accounts** from the Assets Overview page.

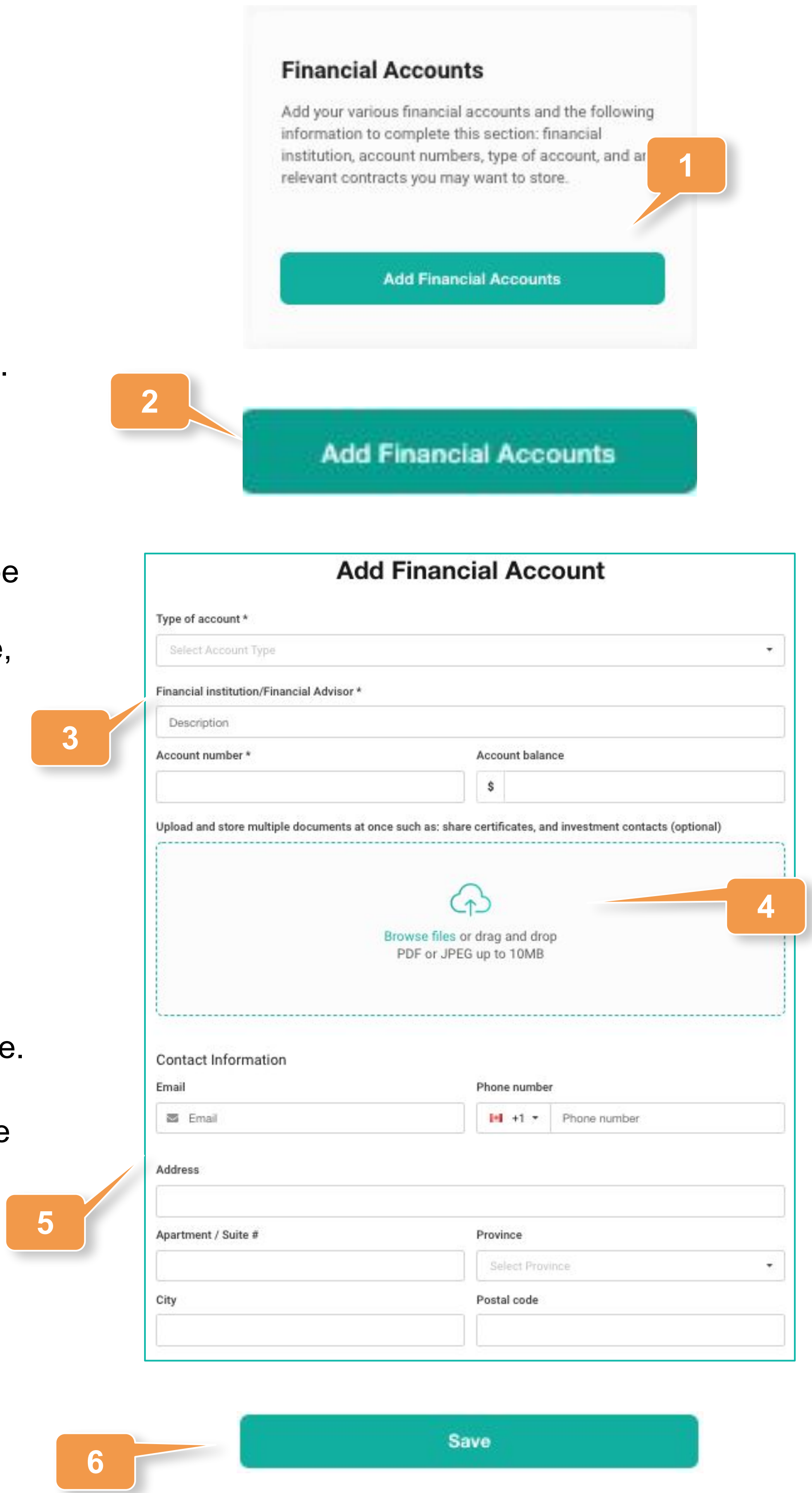
2. Click **Add Financial Accounts**.

3. At a minimum, add the type of financial account, the institution or advisor name, and the account number..

4. Upload digital versions of any relevant financial documentation.

5. Add all other relevant account information, including those that are specific to the account type.

6. Click **Save** to complete the record.



Adding Pensions

1. Click on **Pensions** in the left hand navigation or **Add Pension** from the Assets Overview page.

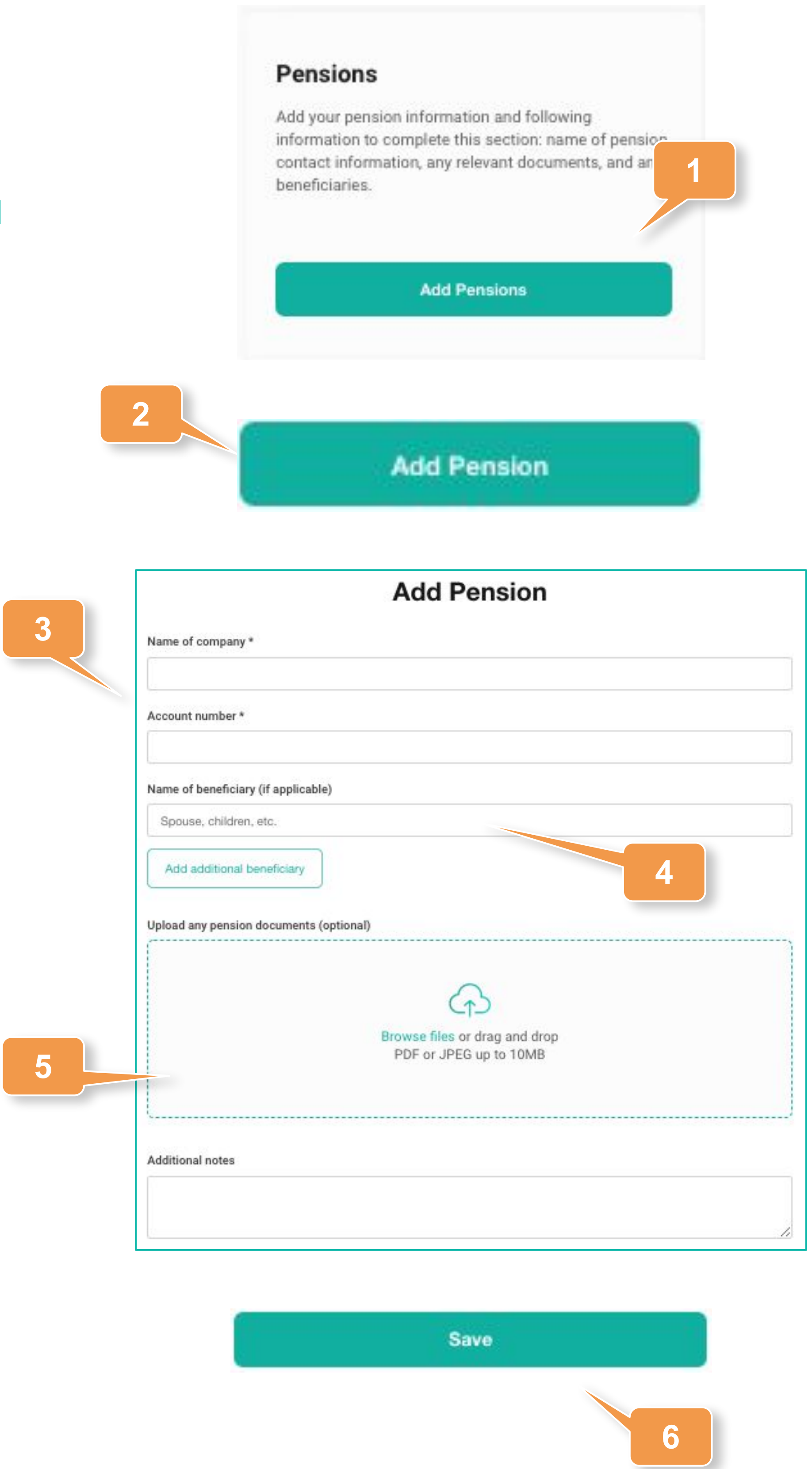
2. Click **Add Pension**.

3. At a minimum, add the name of the pension company and the account number.

4. Add any applicable beneficiaries.

5. Upload digital versions of any pension documentation.

6. Click **Save** to complete the record.



Adding Corporate Holdings

1. Click on **Corporate Holdings** in the left hand navigation or **Add Corporate Holdings** from the Assets Overview page.

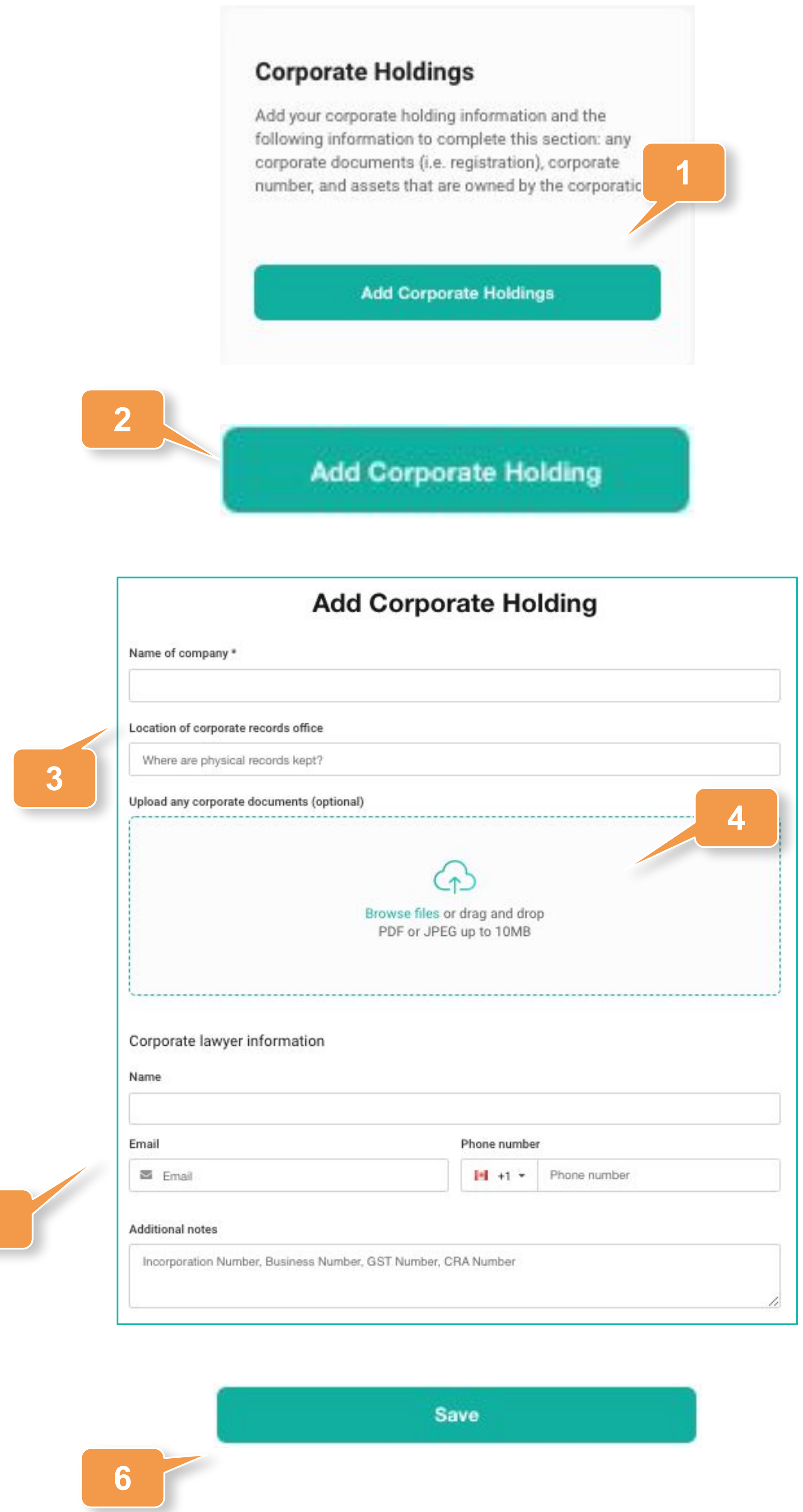
2. Click **Add Corporate Holding**.

3. Add the name of the corporate holding and identify where the corporate records are kept.

4. Upload digital versions of any relevant corporate documentation.

5. Add corporate lawyer contact information.

6. Click **Save** to complete the record.



Adding Annual Taxes

1. Click on **Annual Taxes** in the left hand navigation or **Add Annual Taxes** from the Assets Overview page.

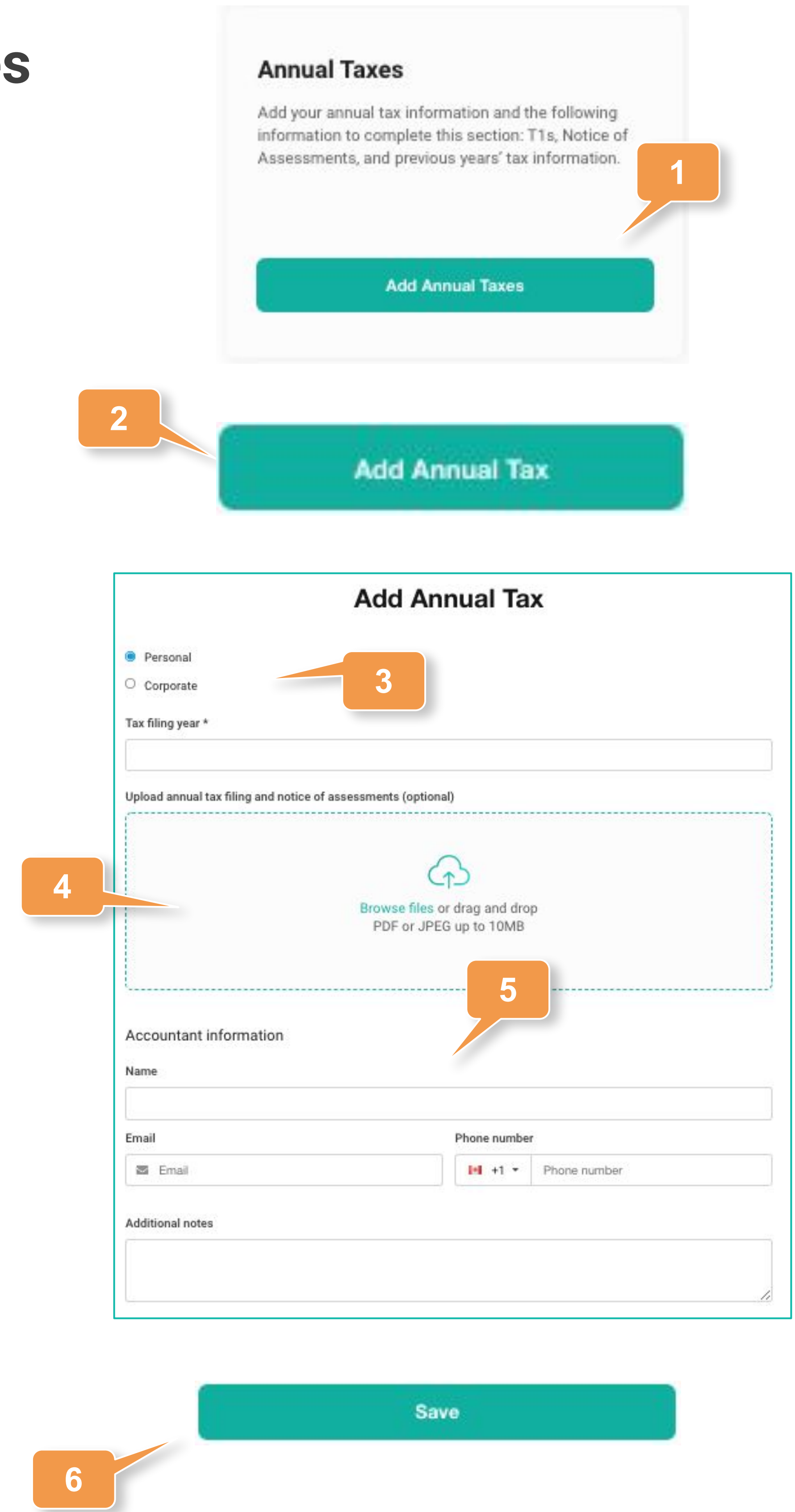
2. Click **Add Annual Tax**.

3. Define if this is a personal or corporate tax and then indicate the tax filing year.

4. Upload digital versions of annual tax filing and notice of assessment.

5. Add accountant contact information.

6. Click **Save** to complete the record.



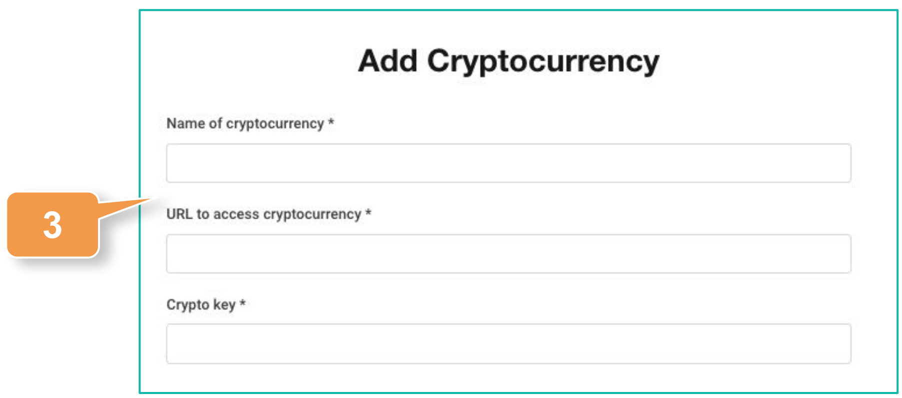
Adding Cryptocurrency

1. Click on **Cryptocurrency** in the left hand navigation or **Add Cryptocurrency** from the Assets Overview page.

2. Click **Add Cryptocurrency**.

3. Enter the name of the cryptocurrency, the URL of where to access it and the crypto key.

4. Click **Save** to complete the record.



Adding Other Assets

1. Click on **Other Assets** in the left hand navigation or **Add Other Assets** from the Assets Overview page.

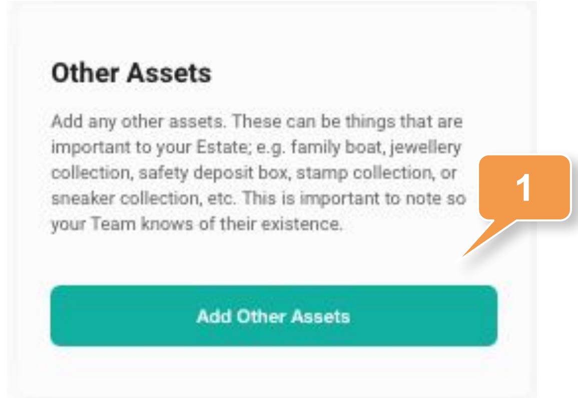
2. Click **Add Other Assets**.

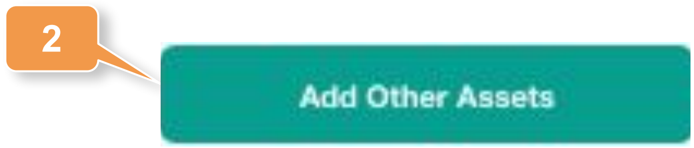
3. Add a title for this specific asset.

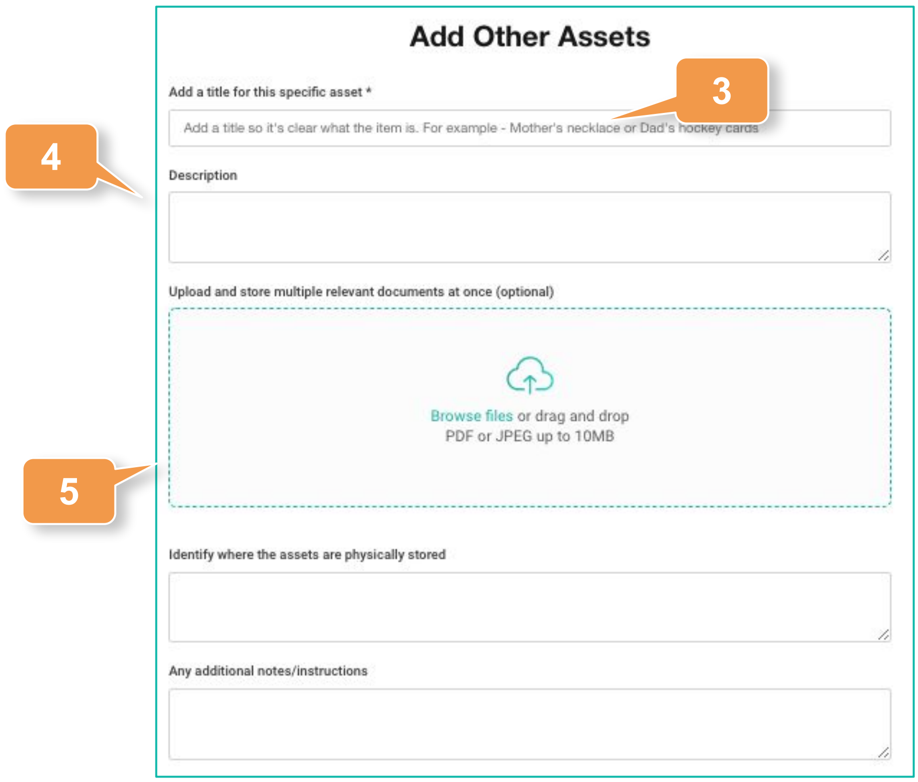
4. If required, add a description of the asset.

5. Upload digital versions of any relevant asset documentation.

6. Click **Save** to complete the record.

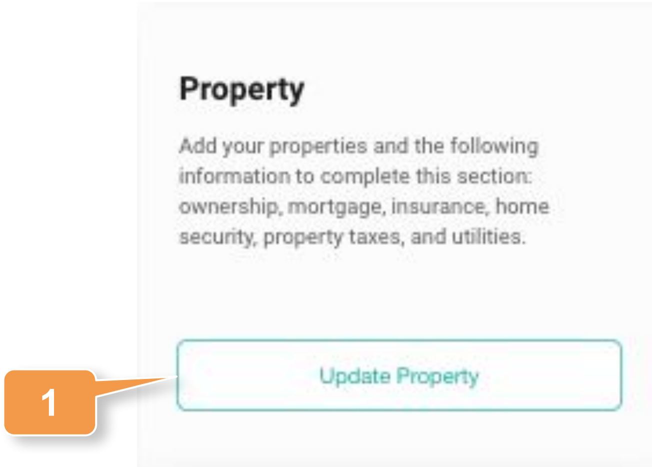






Editing or Deleting an Asset

1. Expand **Assets** in the left hand navigation and click on the relevant asset section or click **Update** within the appropriate asset within the Assets Overview page.



Editing

1. Click the **Edit** icon in the top right corner of the added asset.

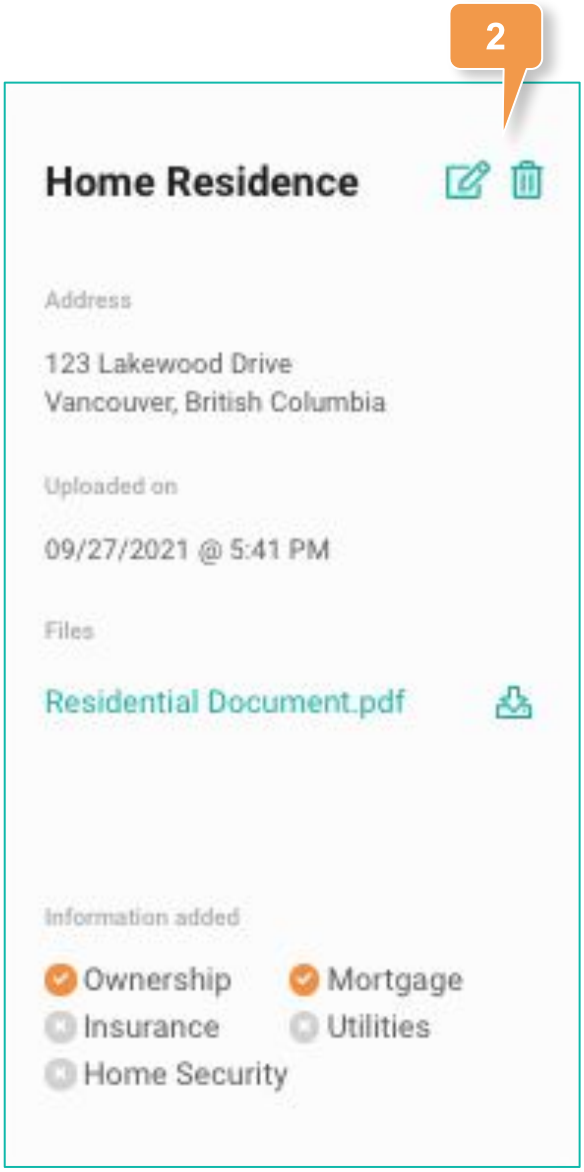
2. Make any required changes or updates.

3. Click **Save** to complete the record.

Deleting

2. Click the **Delete** icon in the top right corner of the added asset.

3. Click **Confirm** to remove the asset.



Contact Support

The ReadyWhen Support Team is available to assist if needed. Contact us at:

T: +1.855.908.5292

E: support@readywhen.ca

W: https://readywhen.com/support