



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.

1

Login

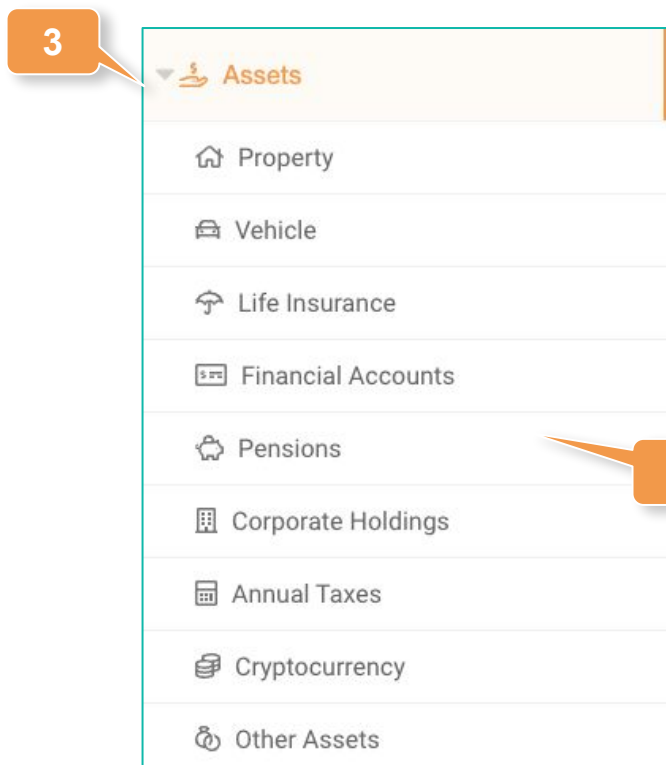
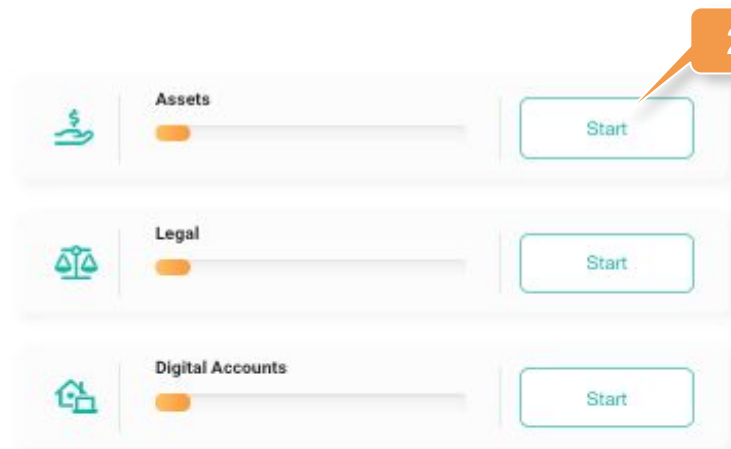
Email

Enter your email

Password

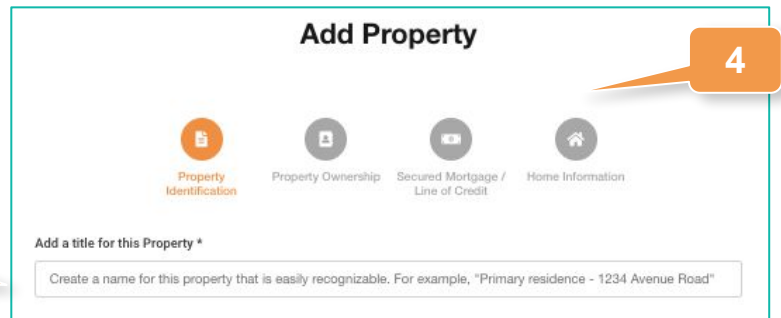
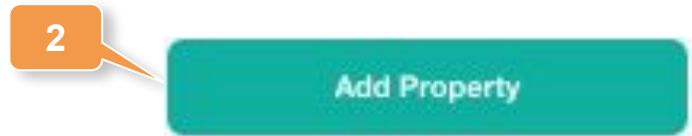
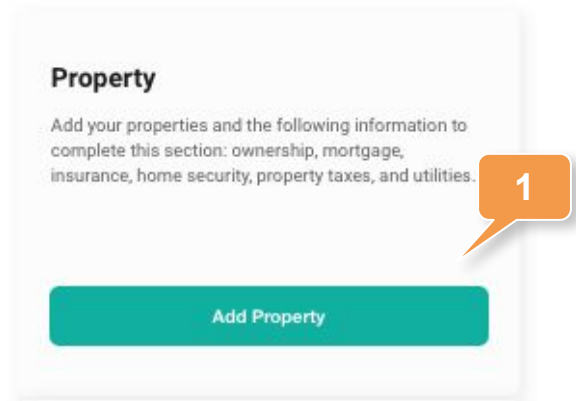
Enter your password

Log In



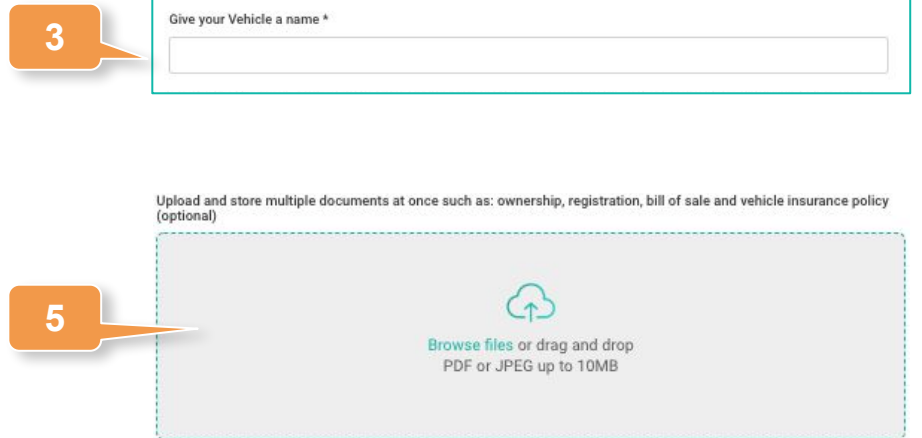
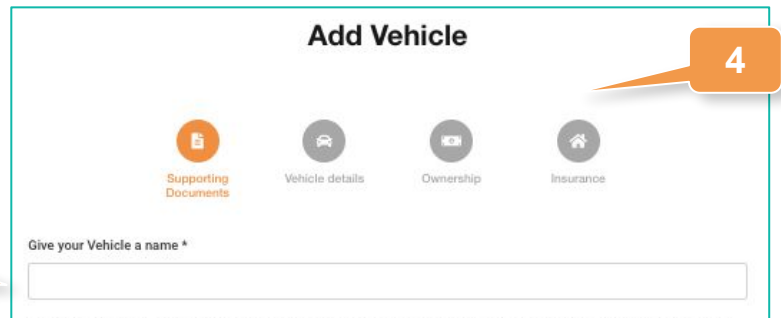
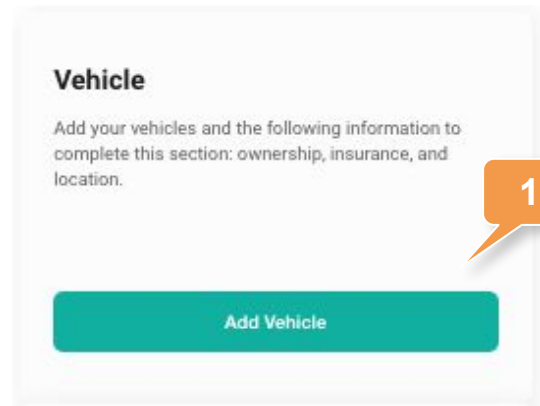
Adding a Property

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.



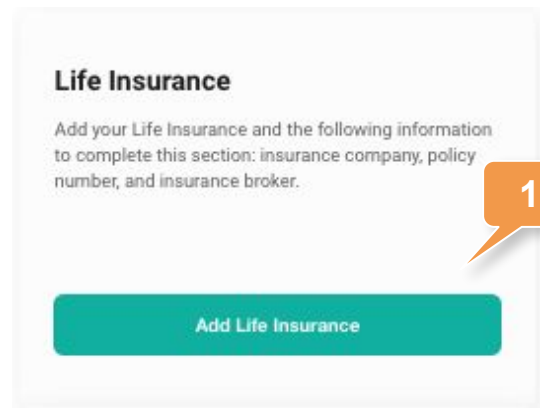
Adding a Vehicle

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.



Add Life Insurance

Title *

Name of life insurance company *

Life insurance policy number *

Life Insurance Policy amount Expiration Date

\$ The value of the policy yyyy-mm-dd

Monthly payment Paid from

\$ Account payable code from

Policy Coverage

Personal policy

Work policy

Mortgage insurance

Name of beneficiary (if applicable)

Spouse, children, etc.

[Add additional beneficiary](#)

Upload and store multiple life insurance policies at once (optional)

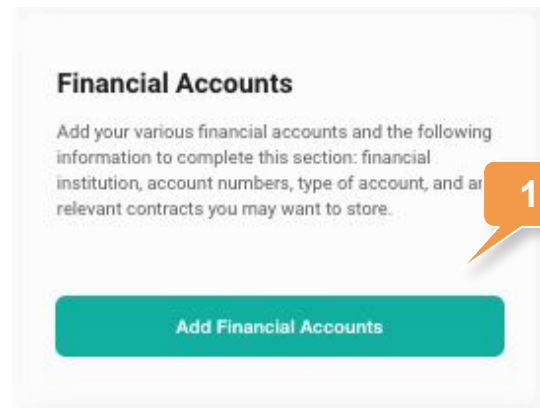
Browse files or drag and drop PDF or JPEG up to 10MB

This screenshot shows the main form for adding life insurance. It contains several input fields for required information: Title, Name of life insurance company, and Life insurance policy number. There are also fields for policy amount and expiration date, monthly payment, and paid from. The form includes radio buttons for selecting the type of policy coverage (Personal, Work, or Mortgage insurance). A field for the name of the beneficiary is also present. At the bottom, there is an optional section for uploading multiple policies, with a callout bubble '5' pointing to the upload area. An orange callout bubble with the number '3' points to the 'Title' field, and another with the number '4' points to the 'Paid from' dropdown menu.



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.



Add Financial Account

Type of account *
Select Account Type

Financial institution/Financial Advisor *
Description

Account number * Account balance
\$

Upload and store multiple documents at once such as: share certificates, and investment contacts (optional)

Browse files or drag and drop PDF or JPEG up to 10MB

4

Contact Information

Email Phone number
+1 Phone number

Address

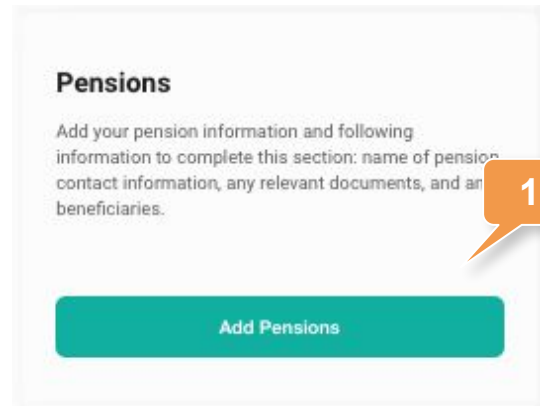
Apartment / Suite # Province
Select Province

City Postal code



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.



Add Pension

Name of company *

Account number *

Name of beneficiary (if applicable)

Add additional beneficiary

4

Upload any pension documents (optional)

Browse files or drag and drop
PDF or JPEG up to 10MB

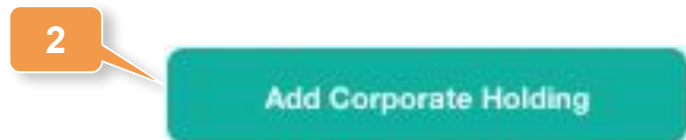
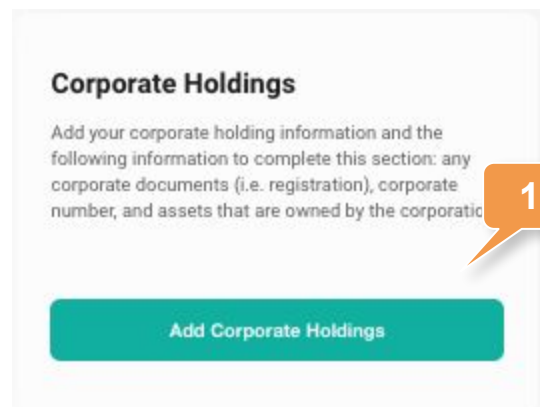
5

Additional notes



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.



Add Corporate Holding

Name of company *

Location of corporate records office
Where are physical records kept?

Upload any corporate documents (optional)
Browse files or drag and drop
PDF or JPEG up to 10MB

Corporate lawyer information

Name

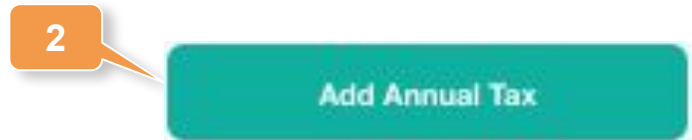
Email Phone number
✉ Email +1 Phone number

Additional notes
Incorporation Number, Business Number, GST Number, CRA Number



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.



Add Annual Tax

Personal
 Corporate

3

Tax filing year *

Upload annual tax filing and notice of assessments (optional)

4

Browse files or drag and drop PDF or JPEG up to 10MB

5

Accountant information

Name

Email Phone number

Additional notes



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.



Add Cryptocurrency

Name of cryptocurrency *

URL to access cryptocurrency *

Crypto key *

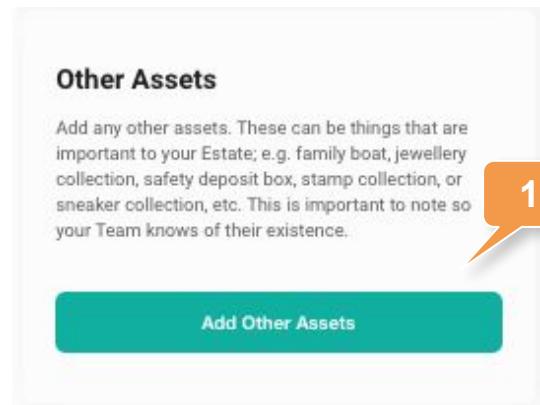
3

This image shows the 'Add Cryptocurrency' form. It has a title 'Add Cryptocurrency' and three input fields: 'Name of cryptocurrency *', 'URL to access cryptocurrency *', and 'Crypto key *'. An orange callout box with the number '3' points to the first input field.



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.



Add Other Assets

Add a title for this specific asset *

Add a title so it's clear what the item is. For example - Mother's necklace or Dad's hockey cards

Description

Upload and store multiple relevant documents at once (optional)

Browse files or drag and drop PDF or JPEG up to 10MB

Identify where the assets are physically stored

Any additional notes/instructions

This screenshot shows the 'Add Other Assets' form. It includes a title field (with callout '3'), a description field (with callout '4'), a document upload area (with callout '5'), a physical storage location field, and an additional notes field. The form is enclosed in a teal border.



Editing or Deleting an Asset

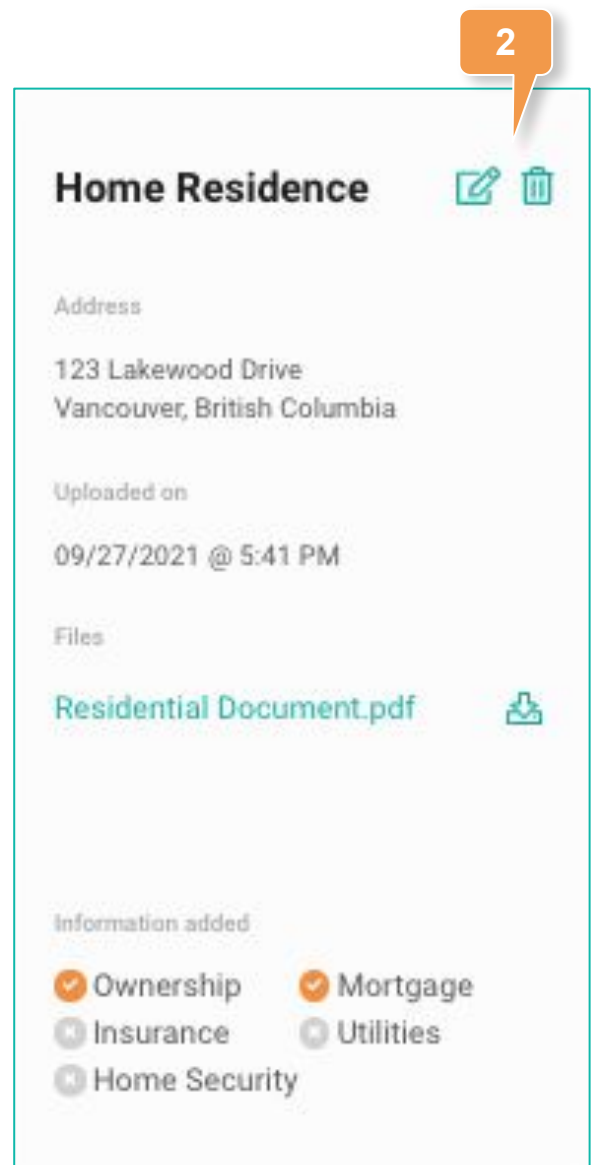
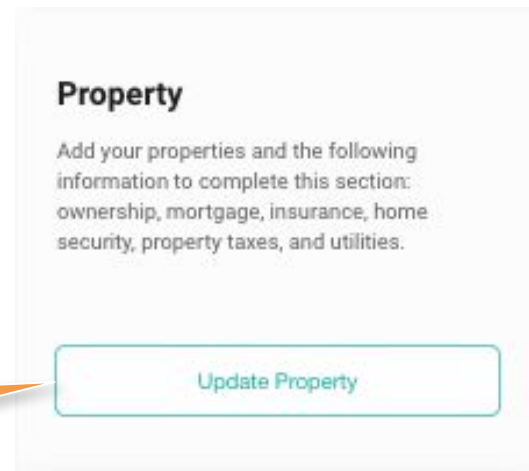
1. Expand **Assets** in the left hand navigation and click on the relevant asset section or click **Update** within the appropriate asset within the Assets Overview page.

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>