



Secret Money Business *for mums*

LESSON 2 - WORKSHEET [1]

Do a stock take of your finances

Use this sheet to record account details & policy numbers that relate to the management of your family's finances.

Tax File Numbers: [list for both]

Household Bank Accounts: [List Account Name / BSB / Acc. Number]

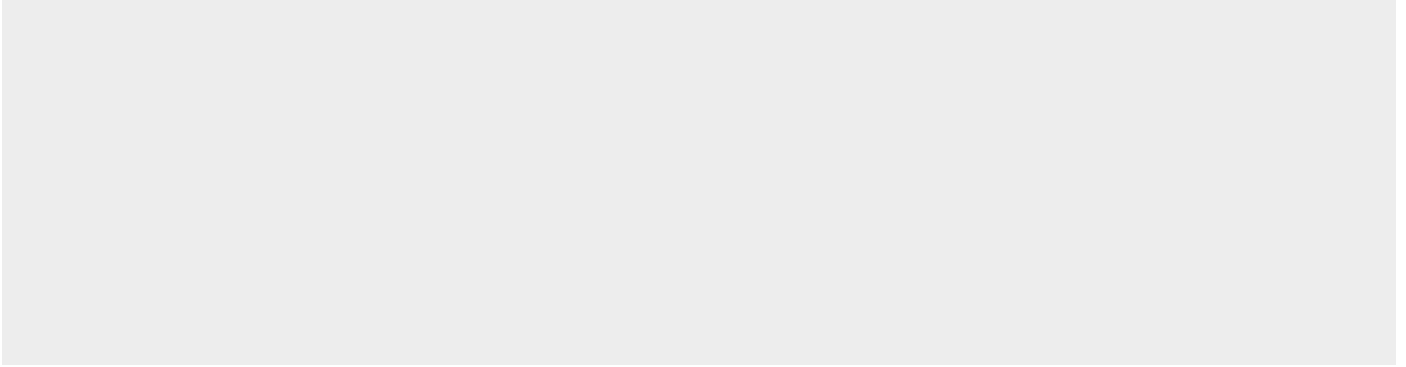
Credit Cards [List card number / credit limit / current balance]

Loans: [List loan Type / BSB / Account Number]

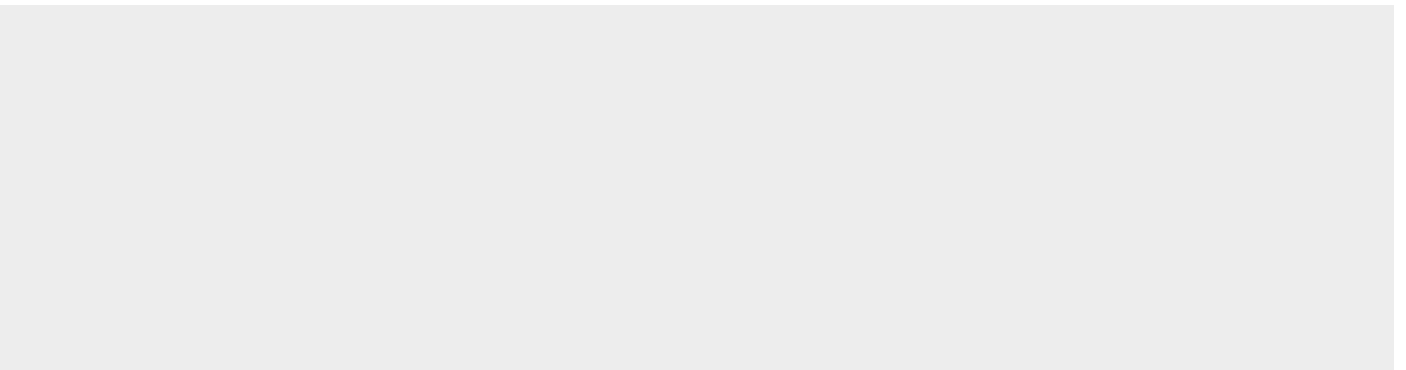


Use this sheet to record account details & policy numbers that relate to the management of your family's finances.

Household Insurance Policies [List policy type / policy number / level of cover]



Life Insurance Policies [list policy type e.g. death cover / policy # / level of cover]



Superannuation Accounts: [List institution / member No. / balance]

