

Home Inventory

Keep track of your personal inventory items such as:

- Contents of your home, storage area, garage, rental or condominium
- Contents of your recreational vehicle
- Music collections of any kind
- Coin collections, stamp collections
- Software
- Home improvements
- and more...

Why Do I need an Inventory?

- Maximize Your Insurance Benefits
 - Facilitate Theft Recovery
 - Aid in Moving and Storage
 - Enhance Your Estate Planning
 - Purchase enough insurance to replace your personal possessions
 - Proof of ownership at the time of a loss
 - Insurance claims settled faster
 - Substantiate losses for your income tax return

Ways To Take A Home Inventory

- Photo/Video Inventory (use voice options)
 - Whole room
 - Individual items.
- Written Inventory
- Software Inventory - on computer or Online

Tips for Home Inventory Photos

- Label photos/videotapes with the dates they were taken.
- If appropriate, record the date of purchase, brand name and purchase price of each item on the record card next to the picture.
- Save images to a CD
- Get an overall picture of the whole room, then take close up pictures of each item, start in one corner of the room and work your way around
- Focus your flash away from mirrors by standing at a 45 degree angle.
- Open drawers with the contents fanned out
- Open closet doors to indicate quantity of clothing.

What Makes a Good Inventory?

- Item Description
- Make/Model

- Serial number
- Purchased at
- Purchase date
- Original Price
- Replacement Cost
- Resale Value
- Receipts and Records
 - Original Receipt
 - Owners Manual
 - Credit Card Receipt
 - Photograph/Video
 - Appraisal
 - Cancelled Checks
 - Repair Records
 - Credit Card Statement
 - Video tape
- Notes
 - Enter Warranty info, notes, etc.
- Category
 - Appliances
 - Bath
 - Clothing
 - Decorations/Art
 - Electronics
 - Emergency Supplies
 - Furnishings
 - Garage and Yard
 - Hobbies/Crafts
 - Jewelry/Valuables
 - Kitchen and Cleaning
 - Linens
 - Medical
 - Office Equipment
 - Sports & Recreation
 - Unassigned
 - Vehicles
 - Add New Categories
- Location
 - Attic
 - Basement
 - Bathroom
 - Bedroom
 - Closets
 - Dining Room
 - Family Room
 - Garage
 - Halls & Entry
 - Kitchen
 - Laundry Room/Utility Room
 - Living Room
 - Office/Study
 - Patio/Deck
 - Safe Deposit Box
 - Unassigned
 - Add New Categories

Inventory Tips

- Keep you inventory up-to-date when you make new purchases.
- Keep inventory in a safe deposit box or another location outside your home.

Emergency Records Organizer

Sometimes important financial information has little to do with the bottom line of an account balance. Wills, insurance policies, emergency contacts—tracking such information is vital to keeping your household running smoothly, especially in the event of an emergency.

Adult or Children Emergency Information

- Contact List
- Physicians/Dentist
- Medical History
- Hospital Information
- Insurance

Adult Important Information

- Summary
- Residence
- Employment/Business
- Business Partners
- Education
- Marriage Information
- Military Information

Children Important Information

- Child's Summary
- School
- Caretaker
- Schedules
- Guardian

Personal & Legal Documents.

- Will
- Living Will
- Funeral Arrangements
- Powers of Attorney
- Birth Certificate
- Passport
- Tax Records

Accounts

- Bank Accounts
- Credit Accounts
- Asset Accounts
- Liability Accounts
- Checking Accounts
- Saving Accounts
- Credit/Debit Accounts
- Other Accounts (Utilities, Phone, etc.)

Income

- Salary
- Dividends
- Interest
- Rental Income
- Annuity
- Trust fund
- Alimony
- Child Support
- Other

Investment and Retirement

- Investment Accounts
- IRA Accounts
- 401K Accounts
- Money Market Accounts
- Certificate of Deposit
- Stocks
- Bonds
- Mutual Funds
- Keogh/SEP Plan
- Pension
- Social Security

Home/Auto/Property

- Property
- Previous Residences
- Safe Deposit Box
- Post Office Box
- Safe
- Alarm Information

- Storage
- Pets
- Automobile
- Motorcycle
- Recreational

Insurance

- Life Insurance
- Medical Insurance
- Dental Insurance
- Auto Insurance

- Property Insurance
- Disability Insurance
- Long term Insurance
- Other

Mortgage/Loans

- House Mortgage
- Personal Loans

- Auto Loans
- School Loans