

Checklist: Information About Your Home

Getting Started

Stop for a second and think about all that goes into running a household. Now, imagine your family trying to piece all of this together without you around to help.

No need to worry. We've identified all this stuff and grouped it into the following sections to help you [populate your Everplan](#) and keep your house in order:

- Basic Home Info: Ownership Status, Deed Location, and Mortgage
- Homeowners or Renters Insurance Policy Details
- Utilities, Vendors, and Services
- Security: Account Info & Instructions for Entering House
- Storage: Location of Facility, Unit Number, and Fees
- Other Real Estate You Own or Rent

Remember

Use this checklist to [get started on your Everplan](#), where you can easily and securely update and share this vital info with the people you love and trust.

BASIC HOME INFO

After you've identified a property (or properties) you need to get organized (example: primary residence; summer home), start with the following info:

Address: _____

Phone Number: _____

Ownership Status (circle one): Owned (paid for) | Owned (financed) | Rent | Other

Location of Original Deed or Lease: _____

Property Tax Info (name of county or township): _____

If Mortgaged:

Mortgage Company Name: _____

Account Number (if applicable): _____

Mortgage Agent Contact Info: _____

Location of Mortgage Paperwork: _____

Additional Info (example: payment method, online account details):

If Rented:

Landlord/Management Company Contact Info: _____

Monthly Rent: _____ Security Deposit: _____

Lease End Date: _____

Location of Lease: _____

Super or Handyman Contact Info: _____

Additional Info: _____

HOMEOWNERS/RENTERS INSURANCE

Name of Insurance Company: _____

Type of Home Insurance (circle all that apply):

Homeowners | Renters | Liability/Umbrella | Mortgage | Flood | Earthquake | Tornado | Other

Insurance Agent Contact Info: _____

Insurance Account or Policy Number: _____

Location of Original Policy Documents: _____

Payment Method: _____

Additional Info (example: details about past claims, accessing digital account or app):

HOUSEHOLD UTILITIES

Have a recent account statement for each utility, as well as contact info if applicable.

Electricity

Gas

Water

Heating Oil/Propane

Internet | Cable | Phone

Wi-Fi Password: _____

Other: _____

VENDORS & SERVICES

Have a recent account statement for each utility, as well as contact and payment info if applicable.

HVAC

Septic

Garbage

Cleaning Service

Landscaping

Plumber

Electrician

Exterminator

Handyman

Pool Care

Other (example: decorator, painter, home network specialist):

SECURITY

What if someone had to get in your house for whatever reason – like a babysitter or trusted neighbor? Here’s the info they would need so they aren’t picked up by the local authorities:

- Name of Security Company: _____
- Contact Info: _____
- Account Number: _____
- Master Password: _____
- Phone Safe Word: _____
- Instructions for Entering House: _____
- Extra Key Location: _____
- Additional Instructions: _____

Tip Time: Helpful Information For All Services Requiring Payment

Be sure to upload the following things [into your Everplan](#) so others in your life know how the bills get paid.

- Recent copies of bills/statements
- Credit cards or bank accounts used to auto-pay bills
- Login and password information for online account management

STORAGE UNIT

Share the following details to prevent your storage locker from ending up on one of those reality shows.

- Name of Storage Facility: _____
- Address/Phone Number: _____
- Unit Number: _____
- Monthly/Annual Fee: _____
- Key Location or Lock Combination: _____
- Additional Instructions: _____

OTHER REAL ESTATE

Don't forget to identify any other real estate holdings you own or rent, which might include rental properties, businesses, or plots of land.

Address: _____

Phone Number: _____

Type of Property (circle all that apply): Rental | Land | Business | Timeshare | Other

If Rental: Is it currently being rented? _____

If Land: Are there any plans for it? _____

If Business: Do you have any partners? _____

If Timeshare: What's the structure/expiration date? _____

Additional Property Details: _____

Location of Paperwork/Relevant Documents: _____

Additional Property Details: _____

NOTES & PERSONAL THOUGHTS

Use this section for any important information, personal thoughts, or anything we may have missed. Remember, you can do this all online. Create an Everplan so this info, along with much more, is neatly organized, securely stored, and easy to share with the people you care about most.

CREATE YOUR EVERPLAN NOW: www.everplans.com

Create, store, and share all of the digital and online account information in this document (and so much more) in a personalized Everplan so it's accessible to those who will need it.