

# Personal Estate Inventory

A personal record of assets and obligations for:

enter your name here

Compliments of:

**INNOVATIVE**  
WEALTH PARTNERS

Dan Scharlach

## Explanation and overview of the Personal Estate Inventory

By maintaining a comprehensive record of your personal affairs, you can keep important information available for easy access in times of emergency; it is important that you, and your family, be able to take immediate action with regard to financial/emergency type affairs.

Also, an inventory is invaluable when death or an incident occurs.

This booklet can be as comprehensive as you deem necessary. Advise family members of this record, and where it is kept. Once a year it is a good idea to update or at least review.

### Table of contents

Personal information.....	3
Important contacts.....	4-7
Important bills.....	8
Health/other.....	9
Emergency plan.....	10
Location of back up/docs.....	11
Insurance policies.....	12
Bank account/credit cards.....	13
Vehicles/misc.....	14
Investments.....	15
Real estate.....	16
Other assets/valuables.....	17
Safety deposit box.....	18

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**Personal information:**

Full legal name	
Birthdate/birthplace	
Your address	
Health insurance plan provider	
Phone number	
Employer company name	
Address (business)	
Phone (home)	
Phone (cell)	
Key contact person at work	
Title	
Spouse/partner full name	
Birthdate/birthplace	
Employer company name	
Address (business)	
Key contact person at work	
Title	
Child's Name	
Birthdate/gender	
Address if not at home	
Child's Name	
Birthdate/gender	
Address if not home	
Child's Name	
Birthdate/gender	
Address if not home	
Child's Name	
Birthdate/gender	
Address if not home	
Executor	
Best phone and email	
Child guardian	
Best phone and email	
Secondary child guardian	
Best phone and email	

**Important contacts (family):**

Family member name and relationship  
Best phone and email


Family member name and relationship  
Best phone and email


Family member name and relationship  
Best phone and email


Family member name and relationship  
Best phone and email


Family member name and relationship  
Best phone and email


Family member name and relationship  
Best phone and email


Family member name and relationship  
Best phone and email


Family member name and relationship  
Best phone and email


Family member name and relationship  
Best phone and email


Family member name and relationship  
Best phone and email


Family member name and relationship  
Best phone and email


Family member name and relationship  
Best phone and email


Family member name and relationship  
Best phone and email


Family member name and relationship  
Best phone and email


### Contacts continued (work):

Work associate name and relationship  
Best phone and email


Work associate name and relationship  
Best phone and email


Work associate name and relationship  
Best phone and email


Work associate name and relationship  
Best phone and email


Work associate name and relationship  
Best phone and email


Work associate name and relationship  
Best phone and email


Work associate name and relationship  
Best phone and email


Work associate name and relationship  
Best phone and email


Work associate name and relationship  
Best phone and email


Work associate name and relationship  
Best phone and email


Work associate name and relationship  
Best phone and email


Work associate name and relationship  
Best phone and email


Work associate name and relationship  
Best phone and email


Work associate name and relationship  
Best phone and email


**Contacts continued (friends):**

Friend's name

Best phone and email

Friend's name

Best phone and email

Friend's name

Best phone and email

Friend's name

Best phone and email

Friend's name

Best phone and email

Friend's name

Best phone and email

Friend's name

Best phone and email

Friend's name

Best phone and email

Friend's name

Best phone and email

Friend's name

Best phone and email

Friend's name

Best phone and email

Friend's name

Best phone and email

Friend's name

Best phone and email

Friend's name

Best phone and email

**Contacts continued (professional relationships):**

Trusted financial advisor	
Best phone and email	
Primary attorney	
Best phone and email	
Primary life insurance agent	
Best phone and email	
Stock broker/misc.	
Best phone and email	
Business insurance agent	
Best phone and email	
Banker	
Best phone and email	
Doctor	
Best phone and email	
Dentist	
Best phone and email	
Realtor	
Best phone and email	
Disability insurance agent	
Best phone and email	
Other attorney	
Best phone and email	
Property and vehicle insurance agent	
Best phone and email	
CPA/tax advisor	
Best phone and email	
Funeral arrangements	
Best phone and email	

Important bills

Rent/mortgage	
Frequency and due date	
Electric company	
Frequency and due date	
Gas company	
Frequency and due date	
Water company	
Frequency and due date	
Insurance company	
Frequency and due date	
Loan 1	
Frequency and due date	
Loan 2	
Frequency and due date	
Loan 3	
Frequency and due date	
Credit card 1	
Frequency and due date	
Credit card 2	
Frequency and due date	
Credit card 3	
Frequency and due date	
Miscellaneous	
Frequency and due date	
Miscellaneous	
Frequency and due date	
Miscellaneous	
Frequency and due date	



**Health concerns/issues (applicable to ANY member living with you):**

You	
Allergies	
Dietary restrictions	
Medical/surgery treatments	
Medications	
Spouse/partner	
Allergies	
Dietary restrictions	
Medical/surgery treatments	
Medications	
Child	
Allergies	
Dietary restrictions	
Medical/surgery treatments	
Medications	
Child	
Allergies	
Dietary restrictions	
Medical/surgery treatments	
Medications	
Child	
Allergies	
Dietary restrictions	
Medical/surgery treatments	
Medications	
Other	
Allergies	
Dietary restrictions	
Medical/surgery treatments	
Medications	
Other	
Allergies	
Dietary restrictions	
Medical/surgery treatments	
Medications	

### Emergency plan/instruction

Meeting location 1


## Plan

## Meeting location 2


## Plan

### Water shutdown location


## Plan

### Gas shutdown location


## Plan

## Fire extinguisher locations


## Plan

Emergency contact


## Best phone and email

### Emergency contact


## Best phone and email

Emergency contact


## Best phone and email

Emergency contact


## Best phone and email

### Emergency contact


## Best phone and email

### Emergency contact


## Best phone and email

Emergency contact


## Best phone and email

Emergency contact


## Best phone and email

Emergency contact


## Best phone and email

**Location of back up file/docs/policies/assets**

## Social security cards

## Location

## Passports

Location

## Birth certificates

Location

Will's

Location

## Medical directives

Location

Item

Location

Item

## Location

Item

Location

Item

Location

Item

Location

Item

Location

Item

Location

Item

Location

Item

Location

Insurance contracts

Life insurance 1	
Owner/insured	
Policy number	
Policy amount	
Beneficiaries	
Agent phone and email	

Life insurance 2	
Owner/insured	
Policy number	
Policy amount	
Beneficiaries	
Agent phone and email	

Life insurance 3	
Owner/insured	
Policy number	
Policy amount	
Beneficiaries	
Agent phone and email	

Life insurance 4	
Owner/insured	
Policy number	
Policy amount	
Beneficiaries	
Agent phone and email	

Disability insurance	
Owner/insured	
Policy number	
Policy amount	
Beneficiaries	
Agent phone and email	

Primary health insurance	
Owner/insured	
Policy number	
Policy amount	
Beneficiaries	
Agent phone and email	

**Bank accounts/credit cards**

Bank 1	
Name	
Type	
Description	
Owners	
Institution contact info	
Address	
Location of checks/checkbooks	

Bank 2	
Name	
Type	
Description	
Owners	
Institution contact info	
Address	
Location of checks/checkbooks	

Credit card 1	
Type	
Bank	
Name on card	
Customer service #	
Credit limit	

Credit card 2	
Type	
Bank	
Name on card	
Customer service #	
Credit limit	

Credit Card 3	
Type	
Bank	
Name on card	
Customer service #	
Credit limit	

Vehicle/miscellaneous

Property insurance	
Owner/insured	
Policy number	
Policy amount	
Beneficiaries	
Agent phone and email	

Vehicle insurance	
Owner/insured	
Policy number	
Policy amount	
Beneficiaries	
Agent phone and email	

Property insurance	
Owner/insured	

Property insurance	
Owner/insured	

Property insurance	
Owner/insured	

Property insurance	
Owner/insured	

Property insurance	
Owner/insured	

Property insurance	
Owner/insured	

Property insurance	
Owner/insured	

Property insurance	
Owner/insured	

Property insurance	
Owner/insured	

Investment accounts

Investment account 1	
Type of account	
Name of institution	
Contact phone and email	
Location of information	

Investment account 2	
Type of account	
Name of institution	
Contact phone and email	
Location of information	

Investment account 3	
Type of account	
Name of institution	
Contact phone and email	
Location of information	

Investment account 4	
Type of account	
Name of institution	
Contact phone and email	
Location of information	

Investment account 5	
Type of account	
Name of institution	
Contact phone and email	
Location of information	

Investment account 6	
Type of account	
Name of institution	
Contact phone and email	
Location of information	

Investment account 7	
Type of account	
Name of institution	
Contact phone and email	
Location of information	

Real Estate/property

Property 1	
Location	
Type	
Date purchased	
Mortgage holder	
Estimated value	
Lender contact info	
Property taxes	
Location of Deeds	

Property 2	
Location	
Type	
Date purchased	
Mortgage holder	
Estimated value	
Lender contact info	
Property taxes	
Location of Deeds	

Property 3	
Location	
Type	
Date purchased	
Mortgage holder	
Estimated value	
Lender contact info	
Property taxes	
Location of Deeds	

Property 4	
Location	
Type	
Date purchased	
Mortgage holder	
Estimated value	
Lender contact info	
Property taxes	
Location of Deeds	



### Other assets (Jewelry, Art, Collectibles, Furnishings, Electronics, etc.)

Item description

Item location

Item description

Item location

Item description

Item location

Item description

Item location

Item description

Item location

Item description

Item location

Item description

Item location

Item description

Item location

Item description

Item location

Item description

Item location

Item description

Item location

Item description

Item location

Item description

Item location

Item description

Item location

**Safety deposit box/miscellaneous**

[illegible]