



INSURANCE DOCUMENTATION PLANNER

HOME INVENTORY BINDER

DOCUMENT • PROTECT • ORGANIZE

This planner belongs to:

Complete Your Home Inventory in One Weekend

✓ BEFORE YOU BEGIN

- ☐ GATHER A SMARTPHONE OR CAMERA
- ☐ COLLECT RECENT PURCHASE RECEIPTS
- ☐ GATHER WARRANTY DOCUMENTS
- ☐ LOCATE OWNER'S MANUALS
- ☐ HAVE THIS HOME INVENTORY BINDER
- ☐
- ☐

✓ STEP 1 - DOCUMENT YOUR HOME

- ☐ RECORD YOUR PROPERTY INFORMATION
- ☐ RECORD INSURANCE POLICY INFORMATION
- ☐ RECORD EMERGENCY CONTACTS
- ☐ RECORD UTILITY INFORMATION

✓ STEP 2 - PHOTOGRAPH EVERY ROOM

- ☐ TAKE WIDE PHOTOS OF EACH ROOM
- ☐ PHOTOGRAPH CLOSETS
- ☐ PHOTOGRAPH STORAGE AREAS
- ☐ PHOTOGRAPH THE GARAGE
- ☐ PHOTOGRAPH SHEDS & OUTDOOR STORAGE

✓ STEP 3 - INVENTORY VALUABLE ITEMS

- ☐ ELECTRONICS
- ☐ APPLIANCES
- ☐ FURNITURE
- ☐ JEWELRY
- ☐ TOOLS
- ☐ COLLECTIBLES
- ☐ FIREARMS (IF APPLICABLE)
- ☐ MUSICAL INSTRUMENTS
- ☐ SPORTING EQUIPMENT

✓ STEP 4 - RECORD IMPORTANT DETAILS

- ☐ MODEL NUMBERS
- ☐ SERIAL NUMBERS
- ☐ PURCHASE DATES
- ☐ PURCHASE PRICES
- ☐ ESTIMATED VALUES
- ☐ WARRANTY INFORMATION

✓ STEP 5 - SAVE SUPPORTING DOCUMENTS

- ☐ RECEIPTS
- ☐ APPRAISALS
- ☐ WARRANT CARDS
- ☐ INSURANCE POLICES
- ☐ PHOTOS OF VALUABLES

✓ STEP 6 - STAY UP TO DATE

- ☐ REVIEW ANNUALLY
- ☐ UPDATE AFTER MAJOR PURCHASES
- ☐ REMOVE ITEMS YOU NO LONGER OWN
- ☐ ADD HOME IMPROVEMENTS & RENOVATIONS

CONGRATULATIONS! YOUR HOME INVENTORY IS NOW ORGANIZED AND READY WHENEVER YOU NEED IT.

NOTES:

SECTION 1

HOME OVERVIEW

Start • Plan • Protect

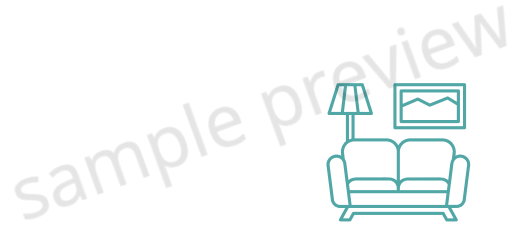


Home Information Sheet



GENERAL INFORMATION	
OWNER NAME:	PHONE:
OWNER NAME:	PHONE:
ADDRESS:	CROSS STREETS:
HOA COMPANY:	PHONE:
SIZE AND DIMENSIONS	
TYPE OF HOME:	YEAR BUILT:
YEAR PURCHASED:	PURCHASE PRICE:
SQUARE FOOTAGE:	LOT SIZE:
NUMBER OF BEDROOMS:	NUMBER OF BATHROOMS:
GARGE TYPE:	GARAGE SIZE:
SECURITY AND ACCESS CODES	
SECURITY COMPANY:	SECURITY CODE:
GARAGE CODE:	DOOR LOCK CODE:
SPARE KEY LOCATION:	MAIL BOX NUMBER:
UTILITIES AND LOCATIONS	
GAS METER:	PROVIDER:
ELECTRIC METER:	PROVIDER
WIFI ROUTER LOCATION:	PROVIDER:
WIFI NETWORK NAME:	WIFI PASSWORD:
TRASH DAY:	PROVIDER:
YARD WASTE DAY:	RECYCLING DAY:
NOTES	

Room Meas



ROOM	LENGTH	WIDTH	CEILING HEIGHT	DOOR SIZE	WINDOW SIZE
NOTES					

Appliance Inventory



APPLIANCE	BRAND	MODEL	SERIAL NUMBER	PURCHASE DATE	WARRANTY
NOTES					

Electronics Inventory



COMMON ITEMS (TV, LAPTOP, TABLET, GAMING CONSOLE, ROUTER, CAMERA, SPEAKERS)						
DEVICE	BRAND	MODEL	SERIAL NUMBER	PURCHASE DATE	PURCHASE PRICE	LOCATION
ADDITIONAL DETAILS / DESCRIPTION						
PHOTO REFERENCE NUMBERS:						

Furniture Purchase Record



ITEM	ROOM	BRAND	LENGTH	DEPTH	HEIGHT
ADDITIONAL DETAILS / DESCRIPTION					
PHOTO REFERENCE NUMBERS:					

Attic Inventory



COMMON ITEMS (SEASONAL DECORATIONS, HOLIDAY STORAGE, OLD FURNITURE, KEEPSAKES, LUGGAGE, DOCUMENTS)				
ITEM / BOX LABEL	DESCRIPTION	ESTIMATED VALUE	QUANTITY	CONDITION
ADDITIONAL DETAILS / DESCRIPTION				
PHOTO REFERENCE NUMBERS:				

Property Insurance



POLICY HOLDER NAME:	
POLICY #:	
START DATE:	END DATE:
TYPE OF POLICY:	COVERAGE AMOUNT:
PREMIUM AMOUNT:	PAYMENT DATES:
AGENT NAME:	
PHONE #:	EMAIL:
PROPERTY ADDRESS:	
PROPERTY DESCRIPTION (SIZE, CONSTRUCTION, TYPE, ETC)	
COVERAGE DETAILS	
PERILS COVERED	
ENDORSEMENTS & RIDERS	
NOTES	

Home Service Providers



SERVICE	COMPANY	CONTACT	PHONE
PLUMBER			
ELECTRICIAN			
HVAC SERVICE			
PEST CONTROL			
LAWN CARE			
CLEANING SERVICE			
HANDYMAN			
APPLIANCE REPAIR			
OTHER			
NOTES			

Disaster Recovery Checklist



USE THIS CHECKLIST IMMEDIATELY AFTER A FIRE, FLOOD, STORM, THEFT, OR OTHER MAJOR PROPERTY LOSS.



ENSURE SAFETY

☐

CONFIRM EVERYONE IS SAFE

☐

CONTACT EMERGENCY SERVICES IF NEEDED

☐

SECURE THE PROPERTY WHEN POSSIBLE

☐

DO NOT ENTER UNSAFE STRUCTURES

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CONTACT IMPORTANT PEOPLE

☐

INSURANCE COMPANY

☐

INSURANCE AGENT

☐

MORTGAGE COMPANY (IF REQUIRED)

☐

UTILITY COMPANIES

☐

FAMILY MEMBERS

☐☐☐

DOCUMENT THE DAMAGE

☐

TAKE PHOTOGRAPHS

☐

RECORD VIDEOS

☐

MAKE NOTES ABOUT DAMAGED AREAS

☐

SAVE RECEIPTS FOR EMERGENCY PURCHASES

☐

KEEP COPIES OF ALL CORRESPONDENCE

☐☐☐☐

BEGIN YOUR INSURANCE CLAIM

☐

RECORD CLAIM NUMBER

☐

RECORD ADJUSTER INFORMATION

☐

SCHEDULE INSPECTIONS

☐

DOCUMENT DAMAGED BELONGINGS

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TRACK CLAIM PROGRESS

☐☐☐

RECOVERY TASKS

☐

ARRANGE TEMPORARY HOUSING

☐

REPLACE IDENTIFICATION DOCUMENTS

☐

CONTACT CONTRACTORS

☐

NOTIFY EMPLOYERS OR SCHOOLS IF NEEDED

☐

UPDATE YOUR HOME INVENTORY BINDER AS REPLACEMENTS ARE PURCHASED

☐☐☐☐

ADDITIONAL NOTES



Thank You

FOR PREVIEWING!



You've just viewed a sample of this planner.
The complete version includes even more pages to help you
stay organized, plan with confidence, and reach your goals.

THE COMPLETE PLANNER INCLUDES:



FULL PLANNER

All pages and
sections
included



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to keep you
on track



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