

# Planning Beyond the Will

## Real Estate



### Location of Titles, Deeds, Lease, and Mortgage Information:

#### Primary Home (owned)

Address:

Property tax information:

Do you have a mortgage on this property?

Yes

No

Mortgage company:

Name of agent:

Contact phone number:

Contact email:

Account number:

Payment frequency:

Amount:

Method:

Account login ID and password:

Any other loans against this property?

Yes

No

If so, please provide full details:

## Primary Home (rented)

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Address:

Landlord's name:

Landlord's phone:

Landlord's email:

Monthly rent and payment information:

Lease end date:

Security deposit:

Additional information:

## Insurance – Homeowner's / Renter's

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Name of insurance company:

Agent:

Agent's phone number:

Agent's email:

Online login ID and password:

Policy number(s) and types (e.g., homeowner's, renter's, flood, umbrella, etc.):

Payment frequency:

Amount:

Method:

Additional notes (e.g., claims in process, disputes, etc.):

## Security Company (if applicable)

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Name of security company:

Contact number:

Account number:

Phone safe word:

Master password:

Home entry instructions:

Location of extra key(s) (including names and contact information of anyone that has a copy):

Payment frequency:

Amount:

Method:

Additional information:

## Secondary Home

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Address:

Property tax information:

Do you have a mortgage on this property?

Yes

No

Mortgage company:

Name of agent:

Contact phone number:

Contact email:

Account number:

Payment frequency:

Amount:

Method:

Additional information:

## Insurance – Second Home (if not linked to master policy)

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Name of insurance company:

Agent:

Agent's phone number:

Agent's email:

Online login ID and password:

Policy number(s) and types (e.g., homeowner's, renter's, flood, umbrella, etc.):

Payment frequency:

Amount:

Method:

Additional notes (e.g., claims in process, disputes, etc.):

## Additional Real Estate

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### 1. Address:

Property tax information:

Do have a mortgage on this property?

Yes

No

Mortgage company:

Name of agent:

Contact phone number:

Contact email:

Account number:

Payment frequency:

Amount:

Payment method:

Any additional information regarding this property?

## Additional Real Estate (continued)

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### 2. Address:

Property tax information:

Do have a mortgage on this property?

Yes

No

Mortgage company:

Name of agent:

Contact phone number:

Contact email:

Account number:

Payment frequency:

Amount:

Payment method:

Any additional information regarding this property?

### 3. Address:

Property tax information:

Do have a mortgage on this property?

Yes

No

Mortgage company:

Name of agent:

Contact phone number:

Contact email:

Account number:

Payment frequency:

Amount:

Payment method:

Any additional information regarding this property?

## Additional Real Estate (continued)

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### 4. Address:

Property tax information:

Do have a mortgage on this property?

Yes

No

Mortgage company:

Name of agent:

Contact phone number:

Contact email:

Account number:

Payment frequency:

Amount:

Payment method:

Any additional information regarding this property?

### 5. Address:

Property tax information:

Do have a mortgage on this property?

Yes

No

Mortgage company:

Name of agent:

Contact phone number:

Contact email:

Account number:

Payment frequency:

Amount:

Payment method:

Any additional information regarding this property?