



Everything My Family Needs to Know *About Our Real Estate Holdings*



Our Real Estate Holdings

This booklet was created as a way to record important Real Estate information that family members or other advisors may need in case the person who handles real estate transactions is unavailable.

In addition to storing a copy of this information in your family's safety deposit box, it's recommended that you keep a copy in a safe location known by at least two other family members or close friends.

Primary Residence

How is Property Titled?

Has Homestead election been filed?

Address:

Phone:

Mortgage Company/Contact:

Trusted Neighbor Contact:

Second Home/Vacation Property

How is Property Titled?

Address:

Phone:

Mortgage Company/Contact:

Trusted Neighbor/Caretaker Contact:

Additional Home/Vacation Property

How is Property Titled?

Address:

Phone:

Mortgage Company/Contact:

Trusted Neighbor/Caretaker Contact:

Investment/Rental Property

How is Property Titled?

How is this Property Zoned?

Address:

Phone:

Mortgage Company/Contact:

Currently rented? If so, Name of Lessee:

Copy of Lease Agreement(s):

Property Manager:

Investment/Rental Property

How is Property Titled?

How is this Property Zoned?

Address:

Phone:

Mortgage Company/Contact:

Currently rented? If so, Name of Lessee:

Copy of Lease Agreement(s):

Property Manager:

Investment/Rental Property

How is Property Titled?

How is this Property Zoned?

Address:

Phone:

Mortgage Company/Contact:

Currently rented? If so, Name of Lessee:

Copy of Lease Agreement(s):

Property Manager:

Timeshare Interest

How is Property Titled?

Description of Interest:

Address:

Mortgage Company/Contact:

Property Manager:

Notes



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