

HOME, CAR, EVERYDAY LIFE

- Deed or Mortgage info
- Car title or Car loan info
- Bills that must be paid
- Trusted contacts (CPA, Lawyer, etc.)

Mortgage info

Lender Name: _____
Account Number: _____
Payment Amount: _____
Payment Frequency: _____
Due Dates: _____
Method of Payment: _____
Automatic or Manual: _____
Original Balance: _____
Most Recent Balance: _____
Balance as of Date: _____
Interest Rate: _____
Contract Location: _____
Co-Signers: _____
Contact Person: _____
Phone Number: _____
Office Address: _____
Email Address: _____
Website: _____
Username: _____
Notes: _____

Cell Service

Provider Name: _____
Account Number: _____
Payment Amount: _____
Payment Frequency: _____
Due Dates: _____
Method of Payment: _____
Automatic or Manual: _____
Contact Person: _____
Phone Number: _____
Email Address: _____
Website: _____
Username: _____
Notes: _____

Car loan info

Provider Name: _____
Account Number: _____
Payment Amount: _____
Payment Frequency: _____
Due Dates: _____
Method of Payment: _____
Automatic or Manual: _____
Contact Person: _____
Phone Number: _____
Email Address: _____
Website: _____
Username: _____
Notes: _____

Trusted Contacts

☐ CPA: _____
☐ Lawyer: _____

Bills that must be paid

☐ Cell phone
☐ Mortgage
☐ Car loan