

# **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