

PERSONAL PROPERTY INVENTORY

WHY COMPLETE A PERSONAL PROPERTY INVENTORY?

In the event of a claim it can be difficult to remember what possessions you have and the value of each item. Completing an Inventory will also help you to determine whether the amount of insurance you carry on your possessions is adequate.

Tips For Completing

Move from room to room completing the Inventory form as you go. It may also be helpful to use a video camera or camera to capture the details of your items. Include descriptions (manufacturer and model number) and serial numbers if applicable. Using store catalogues or online shopping sites determine the replacement value of each item. Total each category then transfer each total to the Summary of Values section to determine the Grand Total amount. The Grand Total amount will help you determine whether the amount of insurance you carry on your possessions is adequate.

One of our Trusted Advisors would be happy to go over your coverage with you. Also ask about insuring valuable jewelry, silverware, furs, coins, stamp and coin collections, bicycles and art work as Scheduled items.

IMPORTANT

Now that you have invested your time and effort in completing your inventory form it would be a shame for it to be destroyed in the event of a fire. For this reason we suggest it be stored off site, in a safety deposit box for example. We also suggest that this inventory be updated periodically, perhaps before your insurance policy renewal each year.

It may also be helpful to make photocopies of important documents and store these along with your inventory. Some Examples of these may be, Land Title, Birth Certificates, passports, Will, Drivers License Numbers, and Bank Account numbers.

INSURANCE POLICIES

| Type of Insurance | Policy Number | Expiry |
|-------------------|---------------|--------|
| | | |
| | | |
| | | |
| | | |
| | | |

CREDIT CARDS

| Credit Card Type | Credit Card Number | Expiry Date |
|------------------|--------------------|-------------|
| | | |
| | | |
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| | | |



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~ Your Personal Property Inventory ~

We suggest that your inventory be reviewed every year before your policy expires to ensure that you are adequately covered.

Please file it in a safe place (eg: safety deposit box) and advise us if you require an increase in coverage.

Client Name: _____ Date Completed: _____

Insurance Co.: _____ Policy #: _____

| Clothing Men | | Clothing Women | | Clothing Children | | #1 | #2 | #3 |
|--------------------------|-------------------|---------------------|-------------------|-------------------|-------------------|--------------------|-------------------|-------------------|
| Items | Replacement Value | Items | Replacement Value | Items | Replacement Value | Replacement Value | Replacement Value | Replacement Value |
| Suits | | Suits | | Suits | | | | |
| Shirts | | Blouses | | Shirts/Blouses | | | | |
| Ties | | Skirts/Dresses | | Skirts/Dresses | | | | |
| Dress Pants | | Dress Pants | | Ties | | | | |
| Casual Pants | | Casual Pants | | Dress Pants | | | | |
| Sweaters | | Sweaters | | Casual Pants | | | | |
| Casual Shirts | | Casual Shirts | | Sweaters | | | | |
| T-Shirts | | Sweat Suits | | Casual Shirts | | | | |
| Sweat Suits | | Jeans | | T-Shirts | | | | |
| Jeans | | Shorts | | Sweat Suits | | | | |
| Shorts | | Coats/Jackets | | Jeans | | | | |
| Coats/Jackets | | Dress Shoes | | Shorts | | | | |
| Dress Shoes | | Casual Shoes | | Coats/Jackets | | | | |
| Casual Shoes | | Boots | | Dress Shoes | | | | |
| Boots | | Underwear | | Casual Shoes | | | | |
| Underwear | | Lingerie | | Boots | | | | |
| Socks | | Socks | | Underwear | | | | |
| Accessories | | Accessories | | Socks | | | | |
| Other: | | Other: | | Accessories | | | | |
| | | | | Other: | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| TOTAL | | TOTAL | | TOTAL | | | | |
| SUMMARY of Values \$\$\$ | | | | | | | | |
| Outside Storage | | Miscellaneous Items | | | | | | |
| Items | Replacement Value | Items | Replacement Value | Living Room | Misc. Living Area | | | |
| BBQ | | | | Dining Room | Other Room(s) | | | |
| Lawn Mower | | | | Kitchen | Inside Storage | | | |
| Lawn Tools | | | | Family Room | Workshop/Garage | | | |
| Garden Tools | | | | Bedroom(s) | Outside Storage | | | |
| Lawn Furniture | | | | Clothing Men | Misc. Items | | | |
| Patio Furniture | | | | Clothing Women | | | | |
| Snow Blower | | | | Clothing Children | | | | |
| Bicycles | | | | Bathroom(s) | | | | |
| Other: | | | | Misc. Valuables | | | | |
| TOTAL | | TOTAL | | | | GRAND TOTAL | | |

