

Ownership & Mortgage

Property Address

[Enter full property address here]

Ownership

Type of Ownership	<i>[e.g., Joint tenants, Tenants in common, etc.]</i>
Owner Name(s)	<i>[Names on the deed]</i>
Date Purchased	<i>[Purchase date]</i>
Purchase Price	<i>[Amount]</i>
Deed Location	<i>[Where the physical deed is stored]</i>

Mortgage

Lender	<i>[Lender name]</i>
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Loan Number	<i>[Account/loan number]</i>
Monthly Payment	<i>[Amount]</i>
Payment Due Date	<i>[Day of month]</i>
How Payment Is Made	<i>[Auto-pay from which account, online portal, etc.]</i>
Interest Rate	<i>[Rate and type - fixed/variable]</i>
Loan Maturity Date	<i>[When it's paid off]</i>
Remaining Balance	<i>[Approximate as of last check]</i>
Escrow Included?	<i>[Yes/No - property tax and insurance in payment?]</i>
Lender Contact	<i>[Phone number and website]</i>

What to Do

If something happens to me, the mortgage payment should continue via auto-pay. If auto-pay stops working, log into the lender's website (credentials in password manager) or call the number above. Notify the lender of the situation — they may offer forbearance or payment adjustments during the transition.