

## FUTURE PLANNING: A GUIDE FOR FAMILIES

### PART 2: WHERE I LIVE

I live...

With family members

- In a home I own
- In a home I rent
- In someone else's home (often called "shared living")
- In housing owned by a service provided (like a group home)
- Somewhere else (describe): \_\_\_\_\_

Complete below only if "I own my home":

Value of property: \_\_\_\_\_

Who should be contacted if I need spare keys?: \_\_\_\_\_

Phone number for contact: \_\_\_\_\_

Mortgage information:

Bank name: \_\_\_\_\_ Monthly Payment: \_\_\_\_\_

Automatic withdrawals?

- Yes
- No

Homeowner's insurance:

Insurer: \_\_\_\_\_ Monthly Payment: \_\_\_\_\_

Automatic withdrawals?

- Yes
- No

Security information:

Security system in home?

- Yes
- No

Company Name: \_\_\_\_\_ Code: \_\_\_\_\_

## PART 2: WHERE I LIVE

Complete below only if “I rent a home”:

Landlord or Rental Company Name: \_\_\_\_\_ Phone: \_\_\_\_\_

On-Site Property Manager: \_\_\_\_\_ Phone: \_\_\_\_\_

Who should be contacted if I need spare keys?: \_\_\_\_\_

Phone number for contact: \_\_\_\_\_

Rental Agreement: How long is the rental period?

- Month to Month
- 12 months
- 24 months
- Other (describe): \_\_\_\_\_

Complete below only if “I live in shared living” or “I live in a home owned by a service provider”:

Agency/Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Who should be contacted if I need spare keys?: \_\_\_\_\_

Phone number for contact: \_\_\_\_\_

Bank name: \_\_\_\_\_ Monthly Payment: \_\_\_\_\_

Automatic withdrawals?

- Yes
- No

Security information:

Security system in home?

- Yes
- No

Company name: \_\_\_\_\_ Code: \_\_\_\_\_

Complete only if I live with family members:

Family Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Who should be contacted if I need spare keys (if not family contact)? \_\_\_\_\_

Phone number for contact: \_\_\_\_\_