

Create Your Own Home Inventory



It's easy!

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1

1

The Need

fire...smoke...theft...floods...tornadoes...
hurricanes...super storms...earthquakes...
wildfires...mudslides...moving truck accidents



The inventory process was horrible. You spend countless hours thinking about and documenting things you don't have any more. Not an easy task.

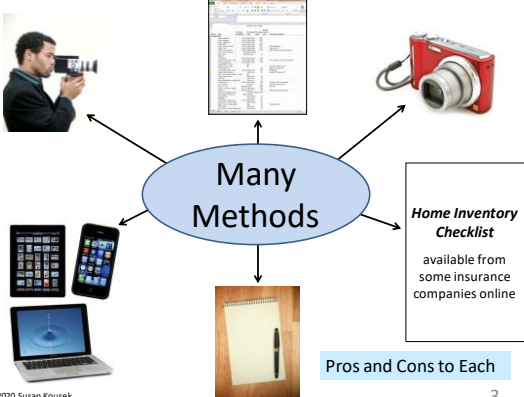
Homeowner who lost her home due to a wildfire.

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2

2

Many Methods



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3

3

What to Record

- Physical assets that could be destroyed, damaged, or stolen
- Why?
 - Sufficient insurance coverage
 - Does your policy say 75% of the dwelling coverage, or 50%? Is that enough? Movers typically insure by weight. Is that enough?
 - Insurance claim
 - Remote access to data
- Consider a separate inventory of:
 - Account numbers (bank, investments, credit cards)
 - Contact info (doctors, attorney, insurance, ICE contacts)
 - Social media user IDs and passwords

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4

4

What do Insurance Companies Require for a Claim?

- Ask your insurance agent
 - Photos and/or video
 - List of items
 - Replacement cost of items
 - Receipts for “big ticket” items
 - Appraisals for valuable items

In the event of a fire or theft, what information do I need in my home inventory?

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5

5

How Detailed Should it Be?

- Depends on you and your purpose
- Case studies
 - Insurance/in case of damage or loss
 - Local or long-distance move
 - Overseas government assignment
 - Corporate move
 - Redecorating (updating inventory)
 - Valuable artwork
 - Valuable jewelry
 - Divorce
 - Death (distribution of estate assets)

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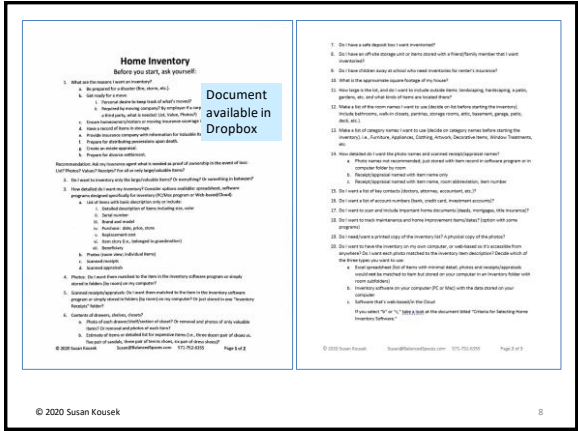
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6

Questions to Ask Yourself

- What is the purpose of my inventory?
- Cloud or on my own computer?
- How detailed do I want it?
- What info does my insurance agent require?
- Do I also want a record of key contacts and financial account numbers?

7



8

Preparation

Decide on names for:

- Rooms
- Categories
- Naming conventions for items
- Naming conventions for:
 - Photos
 - Scanned receipts/appraisals

9

Tips for Photos

- China and silver (close ups of markings)
- Kitchen drawers and cabinets (each drawer and shelf)
- Electronics (photo also of serial number)
- Jewelry
 - Use 12” ruler next to items to show size
 - Lay out on white or black poster board
- Closets and dresser drawers
- Medicine cabinet and bathroom drawers

Make sure you have enough space for all those digital photos!

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16

16

Tips for Scanning

- Name each document as you scan it
- If using a sheet-fed scanner, use a clear document carrier for small receipts
- Other important documents to scan
 - Appraisals
 - Deed to house
 - Plat
 - Car title
 - Warranties
 - Maintenance Contracts
 - Instruction manuals
 - Insurance policy

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17

17

Scanning Options

- Apps for your smartphone
 - I use TurboScan for my iPhone
- Desktop (two that are highly recommended)
 - Fujitsu ScanSnap iX1500
 - Raven Pro Scanner
- What to look for—does it do?
 - Multiple page document feeder
 - Double sided scanning
 - Scanning in color or only black and white
 - OCR (optical character recognition)

Carefully check the reviews and the features of the scanners you're considering.

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18

18

Things to Keep in Mind

- Back up your data and back it up again
 - Multiple backups for redundancy
 - Off-site backup (safe deposit box; friend/family member, preferably not close by)
 - CD (may become obsolete)/Flash drive/external hard drive
 - Cloud
 - Export to spreadsheet or PDF file
 - Paper reports
- Don't forget to inventory your digital assets: user IDs and passwords for your computer, smartphone, social media, and financial accounts

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22

22

These are only a few of the many inventory programs available

- **Excel** spreadsheet on your own computer
- **Collectify** for home inventory (PC and cloud)
- BinaryFormations' **Home Inventory** (Mac)
- **HomeZada** for home inventory/home mgmt (cloud)
- **Pinventory** for inventory, financial documents (cloud) and **CBData** (PC) for home and life inventory
- **Sortly** smartphone app (now geared toward business inventory at a much higher cost)
- **Libib** smartphone app for books, DVDs, CDs, video games
- **Airtable** (mentioned by some of my colleagues, but I haven't tried it)

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23

23

| Room | Item Name | Category | Description | Purchase Date | Purchase Price | Replacement Cost | Notes |
|-------------|-------------------|-------------|----------------------|---------------|----------------|------------------|-------|
| Living Room | TV | Electronics | 55" Samsung LED TV | 2015 | 1,200 | 1,500 | |
| | Chair | Furniture | Modern leather chair | 2018 | 250 | 300 | |
| | Table | Furniture | Wood dining table | 2016 | 300 | 350 | |
| | Decorative object | Decor | Artwork | 2017 | 100 | 120 | |
| | Table, oval | Furniture | Wood dining table | 2017 | 250 | 300 | |
| | Armchair | Furniture | Wood dining chair | 2018 | 200 | 250 | |
| | TV cabinet | Furniture | Wood dining chair | 2018 | 200 | 250 | |
| | TV | Electronics | Smart TV | 2019 | 200 | 250 | |
| | Table | Furniture | Wood dining table | 2019 | 200 | 250 | |
| | Mirror | Decor | Decorative mirror | 2019 | 100 | 120 | |
| Kitchen | Stove | Appliances | Gas range | 2014 | 1,000 | 1,200 | |
| | Refrigerator | Appliances | French door | 2014 | 1,500 | 1,800 | |
| | Dishwasher | Appliances | Front load | 2014 | 800 | 900 | |
| | Range hood | Appliances | Over the range | 2014 | 300 | 350 | |
| | Table | Furniture | Wood dining table | 2015 | 300 | 350 | |
| | Chair | Furniture | Wood dining chair | 2015 | 200 | 250 | |
| | Bar stool | Furniture | Wood dining chair | 2015 | 100 | 120 | |
| | Decorative object | Decor | Artwork | 2016 | 100 | 120 | |
| | Table, round | Furniture | Wood dining table | 2016 | 200 | 250 | |
| | Chair | Furniture | Wood dining chair | 2016 | 150 | 180 | |
| Bedroom | Bed | Furniture | Queen bed | 2015 | 1,000 | 1,200 | |
| | Chair | Furniture | Wood dining chair | 2015 | 200 | 250 | |
| | Table | Furniture | Wood dining table | 2015 | 300 | 350 | |
| | Decorative object | Decor | Artwork | 2016 | 100 | 120 | |
| | Table, oval | Furniture | Wood dining table | 2016 | 250 | 300 | |
| | Chair | Furniture | Wood dining chair | 2016 | 200 | 250 | |
| | TV cabinet | Furniture | Wood dining chair | 2016 | 200 | 250 | |
| | TV | Electronics | Smart TV | 2016 | 200 | 250 | |
| | Table | Furniture | Wood dining table | 2016 | 200 | 250 | |
| | Mirror | Decor | Decorative mirror | 2016 | 100 | 120 | |
| Bathroom | Shower | Appliances | Walk-in shower | 2014 | 1,500 | 1,800 | |
| | Toilet | Appliances | Standard | 2014 | 300 | 350 | |
| | Sink | Appliances | Standard | 2014 | 200 | 250 | |
| | Vanity | Furniture | Wood dining table | 2014 | 300 | 350 | |
| | Chair | Furniture | Wood dining chair | 2014 | 200 | 250 | |
| | Table | Furniture | Wood dining table | 2014 | 300 | 350 | |
| | Decorative object | Decor | Artwork | 2015 | 100 | 120 | |
| | Table, oval | Furniture | Wood dining table | 2015 | 250 | 300 | |
| | Chair | Furniture | Wood dining chair | 2015 | 200 | 250 | |
| | Mirror | Decor | Decorative mirror | 2015 | 100 | 120 | |
| Hallway | Table | Furniture | Wood dining table | 2015 | 300 | 350 | |
| | Chair | Furniture | Wood dining chair | 2015 | 200 | 250 | |
| | Table | Furniture | Wood dining table | 2015 | 300 | 350 | |
| | Chair | Furniture | Wood dining chair | 2015 | 200 | 250 | |
| | Table | Furniture | Wood dining table | 2015 | 300 | 350 | |
| | Chair | Furniture | Wood dining chair | 2015 | 200 | 250 | |
| | Table | Furniture | Wood dining table | 2015 | 300 | 350 | |
| | Chair | Furniture | Wood dining chair | 2015 | 200 | 250 | |
| | Table | Furniture | Wood dining table | 2015 | 300 | 350 | |
| | Chair | Furniture | Wood dining chair | 2015 | 200 | 250 | |
| Garage | Table | Furniture | Wood dining table | 2015 | 300 | 350 | |
| | Chair | Furniture | Wood dining chair | 2015 | 200 | 250 | |
| | Table | Furniture | Wood dining table | 2015 | 300 | 350 | |
| | Chair | Furniture | Wood dining chair | 2015 | 200 | 250 | |
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| | Chair | Furniture | Wood dining chair | 2015 | 200 | 250 | |

Example of inventory in Excel. Template available in Dropbox.

Room totals (replacement cost) highlighted in yellow. Added up using Excel's AutoSum function.

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24

24

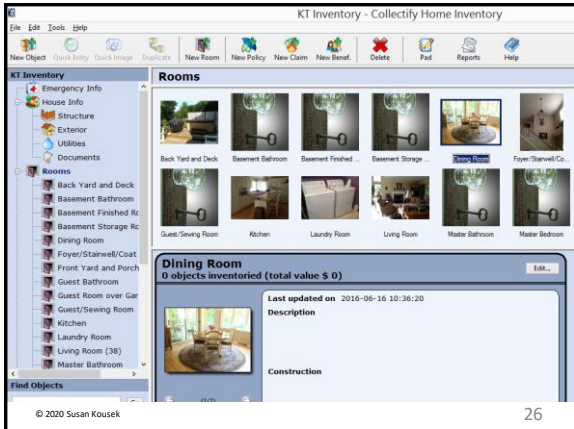
Collectify (since 2001)
<https://www.collectify.com/>

- For Windows PC, also Cloud version
- Tutorial videos, Quick Start Guide, User Guide
- Drag & drop multiple images to create entries
- Can store video and audio as well as photos
- Quick Image & Quick Entry (can create one item per image, or one item with multiple images)
- \$39.95 to purchase PC version; Cloud version—contact them for price

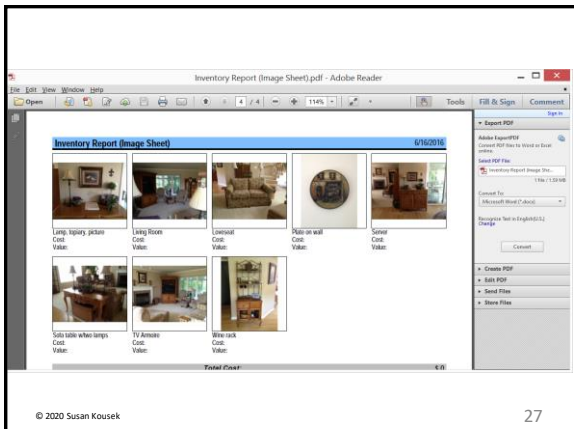
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25

25



26



27

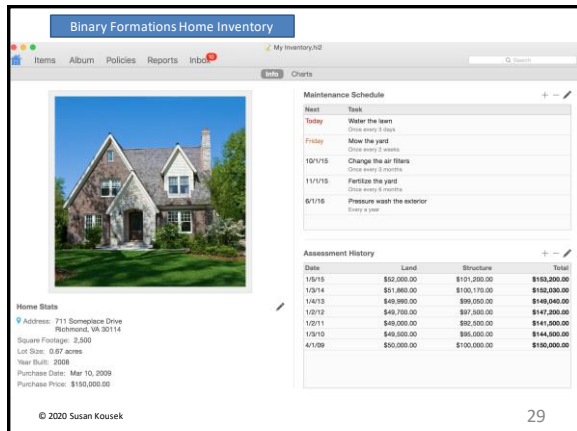
Home Inventory (since 2005) <https://binaryformations.com/>

- For Mac
- \$23.99 at Mac store
- Quickly add multiple photos
- New features in version 3.5 released May 2016
 - Free Home Inventory Remote Entry app (for iPhone and iPad) that allows you to take photo, give it a name, and then dictate details about it to add to your inventory on your Mac
 - Inbox where you can send digital receipts for your purchases from email, web browsers, and other apps

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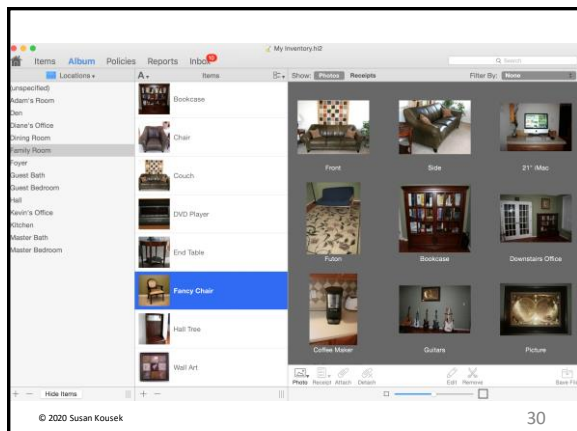
28

28



29

29



30

30

HomeZada (since 2012)

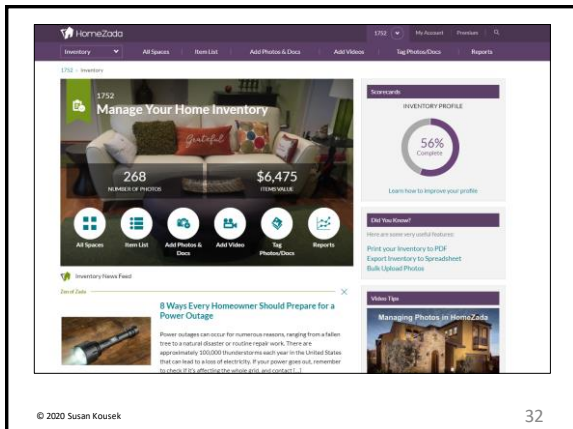
<https://www.homezada.com/>

- Cloud-based
- Home inventory (free version—cannot print or export; paid version is \$59/year)
- Home maintenance (checklist & reminders)
- Home improvement (plan and track projects)
- Home finances (related to house: mortgage, utilities, home services)
- Quick Actions to quickly upload multiple photos

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31

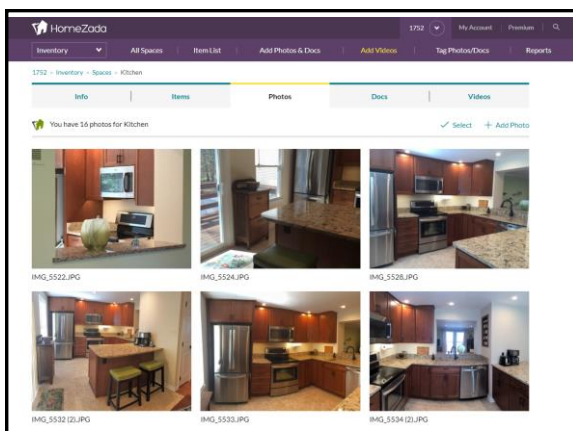
31



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32

32



33

Pinventory (new in 2020) and CBData (since 2009)

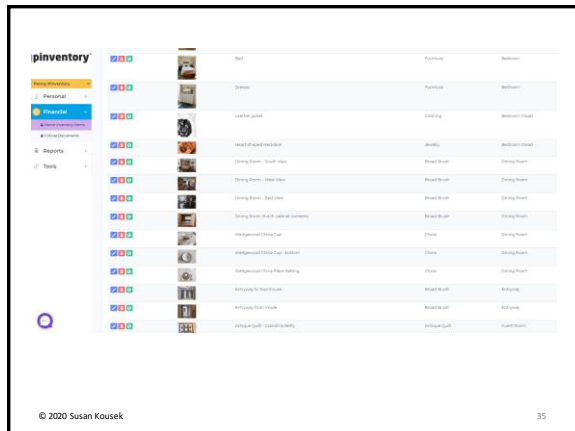
<https://www.pinventory.com/>

- Home inventory and critical documents
- Cloud-based Pinventory
 - \$6.95/month for Pinventory—inventory
 - 14-day free trial
 - \$11.95/month for Pinventory Plus—inventory+ financial

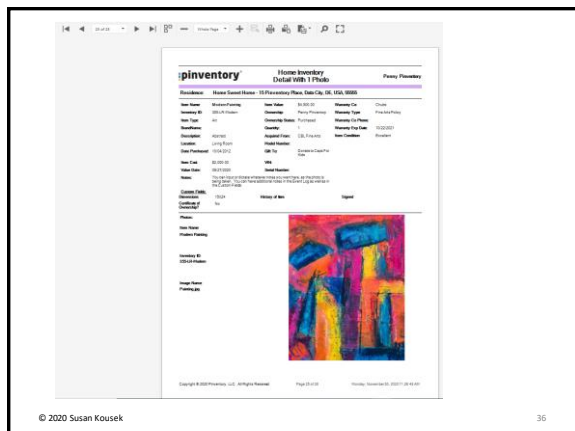
<https://www.cbdatasystems.com/>

- For Windows PC: CBData (home inventory; personal, medical, financial info)
 - \$150.00 one-time fee
 - \$30.00/year for upgrades

34



35



36

CBData

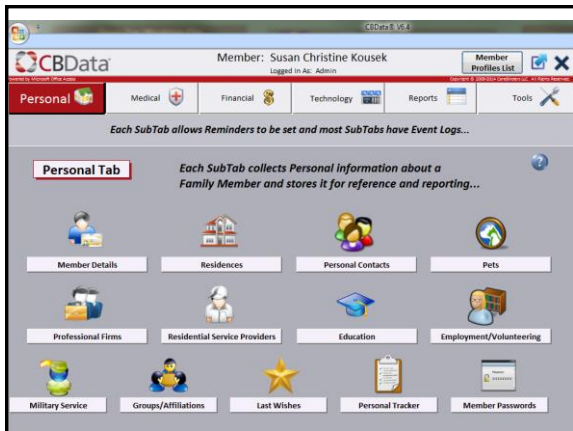
<https://www.cbdatasystems.com/>

- Inventory
- Financial records
- Medical records

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37

37



38



39

Sortly app (fairly new)

<https://www.sortly.com/>

- No longer available for personal \$5/month use (Plan Plus users are grandfathered in)
- Free version allows only 100 items
- Now geared toward business users, \$468/year, up to 2,000 items

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40

40

Libib Home Library Management App

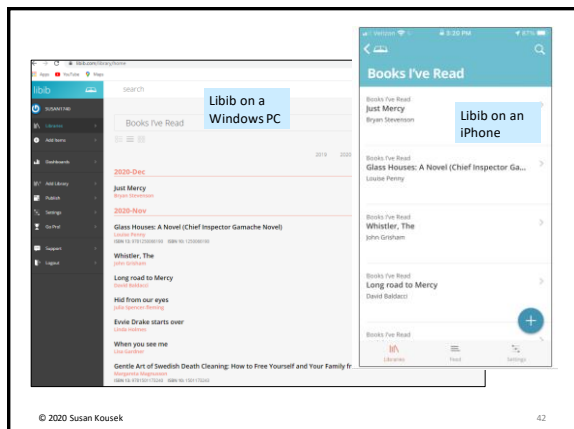
<https://www.libib.com/>

- Barcode scanning for
 - Books
 - Movie DVDs
 - Music CDs
 - Video games
- Available for smartphones (iOS and Android) and syncs to cloud so you have same info available via your computer
- Free and paid versions

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41

41



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42

42

Resource Documents for you:

1. Home inventory—before you start, ask yourself...
2. Criteria for selecting home inventory software
3. Sample room and category list
4. Create a home inventory, step-by-step
5. An Excel template to use for your inventory

Link to access these documents:

<https://tinyurl.com/Inventory-LLI>

Link is case-sensitive. You do NOT need to have a Dropbox account.

If unable to access, email me and I'll email you the files: Susan@BalancedSpaces.com

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43

43

About Susan Kousek, CPO®

- Certified Professional Organizer® since 2007 and Owner of Balanced Spaces®, LLC in Reston, VA since 1999.
- Prepared her first home inventory for a client in 1980
- Teaches seminars and workshops on organizing and time management
- Does consultations for clients who need a jump start to declutter and/or downsize and works virtually to help you:
 - Create your home inventory quickly
 - Get set up in Quicken
 - Organize your digital files and email messages
 - Create your vital documents list and information

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Email Susan if you'd like to be added to her email list to receive organizing tips and notices of seminars. (You can unsubscribe at any time.)

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44

44

Special Offer—25% discount on virtual services

Putting off creating your home inventory because you think it's too much work?

I can help you create your home inventory virtually. Here's how it works:

1. We schedule phone appointments (one or more hours each appointment).
2. I talk you through taking the photos.
3. You dictate the information about each item to me and I enter it in an Excel spreadsheet.
4. I provide you with the Excel spreadsheet you can edit whenever you wish.
5. At any time after the first hour, you can decide to continue on your own.

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45
