



Bertram Rose
Estate Agents



HOUSEHOLD
PLANNER

PROPERTY DETAILS

HOUSE DETAILS	
Address	
Property Type	
Freehold / Leasehold	
Year Built	
Number of Bedrooms	
Number of Bathrooms	
Council Tax Band	
Water Supplier	
Gas Supplier	
Electrical Supplier	
Boiler Make / Model	
Heating Type	
Double Glazing	
Roof Type & Material	
Garden Size	
Parking	
Security Features	

HOME IMPROVEMENT PLAN

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UTILITIES

MORTGAGE	
Company	
Policy No.	
Phone No.	
Website	
Renewal date	

WATER	
Company	
Policy No.	
Phone No.	
Website	
Renewal date	

GAS	
Company	
Policy No.	
Phone No.	
Website	
Renewal date	

ELECTRICITY	
Company	
Policy No.	
Phone No.	
Website	
Renewal date	

SATELLITE / CABLE	
Company	
Policy No.	
Phone No.	
Website	
Renewal date	

INTERNET	
Company	
Policy No.	
Phone No.	
Website	
Renewal date	

MOBILE	
Company	
Policy No.	
Phone No.	
Website	
Renewal date	

Company	
Policy No.	
Phone No.	
Website	
Renewal date	

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INSURANCE DETAILS

INSURANCE COMPANY:	
Provider Name	
Policy No.	
Phone No.	
Website	
Number of years no claims	
Renewal Date	
Notes:	

INSURANCE COMPANY:	
Provider Name	
Policy No.	
Phone No.	
Website	
Number of years no claims	
Renewal Date	
Notes:	




INSURANCE COMPANY:	
Provider Name	
Policy No.	
Phone No.	
Website	
Number of years no claims	
Renewal Date	
Notes:	


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PASSWORD TRACKER



	
	
	


	
	
	




	
	
	

SAMPLE LEAVES

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BANK DETAILS

CURRENT ACCOUNT	
Name on Account	
Account Number	
Sort Code	
Type of Account	
Over Draft Limit	
Card Number	

SAVINGS ACCOUNT	
Name on Account	
Account Number	
Sort Code	
Type of Account	
Withdrawal Limit	
Total Withdrawals Allowed	
Interest Rate	
Card Number	

CREDIT CARD	
Name on Account	
Card Number	
Credit Limit	
Statement Date	
Balance Due Date	

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FURNITURE LOG

ITEM	DATE PURCHASED	WARRANTY PERIOD	PRICE	REPLACEMENT DUE DATE
Bed				
Mattress				
Bedroom TV				
Wardrobe				
Drawers				
Sofa				
Chair(s)				
Front Room TV				
Coffee Table				
Dining Table				
Dining Chairs				
Fridge				
Freezer				
Cooker				
Dishwasher				
Microwave				
Vacuum				
Boiler				
Shower				
Carpets				

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FAMILY CONTACTS

FAMILY MEMBER:	
Name	
Date of Birth	
Address	
Mobile Number	
E-mail Address	
Notes	

FAMILY MEMBER:	
Name	
Date of Birth	
Address	
Mobile Number	
E-mail Address	
Notes	

FAMILY MEMBER:	
Name	
Date of Birth	
Address	
Mobile Number	
E-mail Address	
Notes	

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HOUSEHOLD TASKS

MONTH:

WEEKLY

MONTHLY

SAMPLE LEAVES

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MEDICAL INFORMATION

NAME:

MEDICAL PROCEDURE	DATE

MEDICINES	DATE

ALLERGIES	DATE

CONCERNS	

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PAINT TRACKER

Room	
Colour	
Paint Brand	
Product	
Sheen	
Notes:	

SAMPLE:

Room	
Colour	
Paint Brand	
Product	
Sheen	
Notes:	

SAMPLE:

Room	
Colour	
Paint Brand	
Product	
Sheen	
Notes:	

SAMPLE:

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IMPORTANT DATES

JULY	

AUGUST	

SEPTEMBER	

OCTOBER	

NOVEMBER	

DECEMBER	

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WEEK PLANNER

Friday	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Saturday	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Sunday	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Notes	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

SAMPLE LEAVES

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