



Insurance Advisor Reference Guide

Helping Families Protect Their Personal
Property Before It Becomes a Problem

**Prepared exclusively for
Insurance Professionals**

TakeStock[®]
The Home Inventory Experts

www.takestockinventory.com
844-929-2669

A Letter from Marian Haggar Bryan

Dear Insurance Professional,

Thank you for taking the time to learn more about TakeStock.

One of the greatest challenges homeowners face is knowing whether they have enough contents coverage and being able to document what they own if a loss occurs. Unfortunately, many clients have never completed a personal property inventory or estimated the value of their belongings.

TakeStock helps solve both problems.

Our professional home inventories provide organized photographs, detailed descriptions, and estimated valuations of personal property. This gives your clients a clearer understanding of what they own and creates an excellent foundation for reviewing and adjusting their insurance coverage when appropriate.

If a claim ever occurs, having this information readily available can significantly reduce the time and stress involved in documenting losses, allowing clients to focus on recovery instead of trying to remember everything they owned.

Our goal is not to replace the trusted relationship you have with your clients, but to strengthen it by providing a valuable service that helps them better protect the things that matter most.

Thank you for considering TakeStock as a resource for your clients. We look forward to working with you.

Warm regards,

Marian Haggar Bryan

CEO | TakeStock Inventory

Why Personal Property Documentation Matters

Most homeowners have no idea what their personal belongings are actually worth until they're faced with a major loss.

Without a current inventory, it's easy to underestimate the value of furniture, clothing, electronics, collectibles, artwork, jewelry, tools, and other everyday possessions. As a result, many families unknowingly carry less contents coverage than they may need.

A professional inventory provides more than a list of belongings; it creates a documented record of a client's personal property, complete with photographs, descriptions, and estimated replacement values. This information helps homeowners better understand what they own and provides a solid foundation for meaningful insurance conversations.

Key Benefits

- Better understand the value of personal property
- Identify potential gaps in contents coverage
- Document high-value possessions before a loss occurs
- Create a valuable record for future reference
- Gain greater peace of mind knowing important information is organized and accessible



How TakeStock Helps Your Clients

Homeowners have different insurance needs, but everyone benefits from organized documentation of their personal property.

TakeStock provides a secure process to help homeowners document their belongings and better understand the estimated value of their personal property, giving them useful information for coverage discussions with their insurance advisor.

A Better Experience for Your Clients

Secure Family Portal

Clients can securely access their inventory, browse photographs of their belongings, and review documentation whenever they need it—all from one convenient location.

Estimated Replacement Values

General replacement value estimates help clients better understand the value of their personal property, identify high-value items, and support more informed insurance coverage discussions.

Organized Documentation

Every room is photographed and documented in a consistent, easy-to-understand format, creating a permanent digital record of the home's contents.

Customized Reporting

Whether a client needs a complete Inventory Report, room-by-room documentation, high-value item summaries, or reports to help organize information after a loss, TakeStock provides reports tailored to their needs.

One Secure Location

Photographs, documentation, estimated values, and reports remain securely stored and accessible whenever they're needed for annual policy reviews, future updates, or in the event of a claim.

What Your Clients Can Expect

From the initial consultation to the final reports, our process is designed to be simple, organized, and valuable for both your clients and your agency.



Step 1

Discovery & Planning

We begin by understanding the client's home, insurance goals, collections, and any unique property that may require special attention.



Step 2

Home Documentation

Our team photographs and documents the home's contents room by room, creating a complete digital record of personal property.



Step 3

Organization & Valuation

Items are identified, categorized, and assigned estimated replacement values, creating a structured inventory that's easy to review and update.



Step 4

Secure Client Portal

Clients receive secure online access to their inventory, photographs, and documentation, making it easy to review, update, and reference their personal property whenever needed.



Step 5

Reports & Ongoing Access

Customized reports and documentation are delivered electronically, providing clients and their insurance advisors with organized information for policy reviews, future updates, or claims.

When to Recommend TakeStock

A professional home inventory isn't just valuable after a loss—it's one of the best ways to help clients understand what they own, evaluate their contents coverage, and prepare before they ever need to file a claim.

Consider recommending TakeStock when your clients are:

Completing an annual insurance review	Purchasing a new home
Acquiring valuable collections or artwork	Renovating or expanding their home
Owning multiple residences or vacation homes	Downsizing or relocating
Reviewing contents coverage	Recovering from a major life event

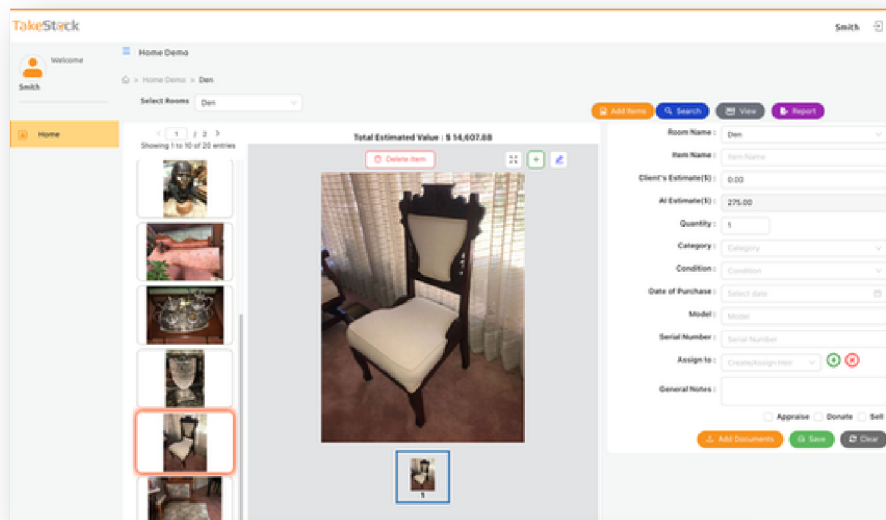
A Simple Rule

If a client would benefit from a better understanding of their personal property, or may one day need to document it for an insurance claim, it's a great time to recommend TakeStock. Early documentation helps clients make informed coverage decisions and provides organized records when they're needed most.

The TakeStock Portal

A secure online workspace where clients can document their personal property, review estimated values, and maintain organized records that support insurance coverage discussions and claims documentation.

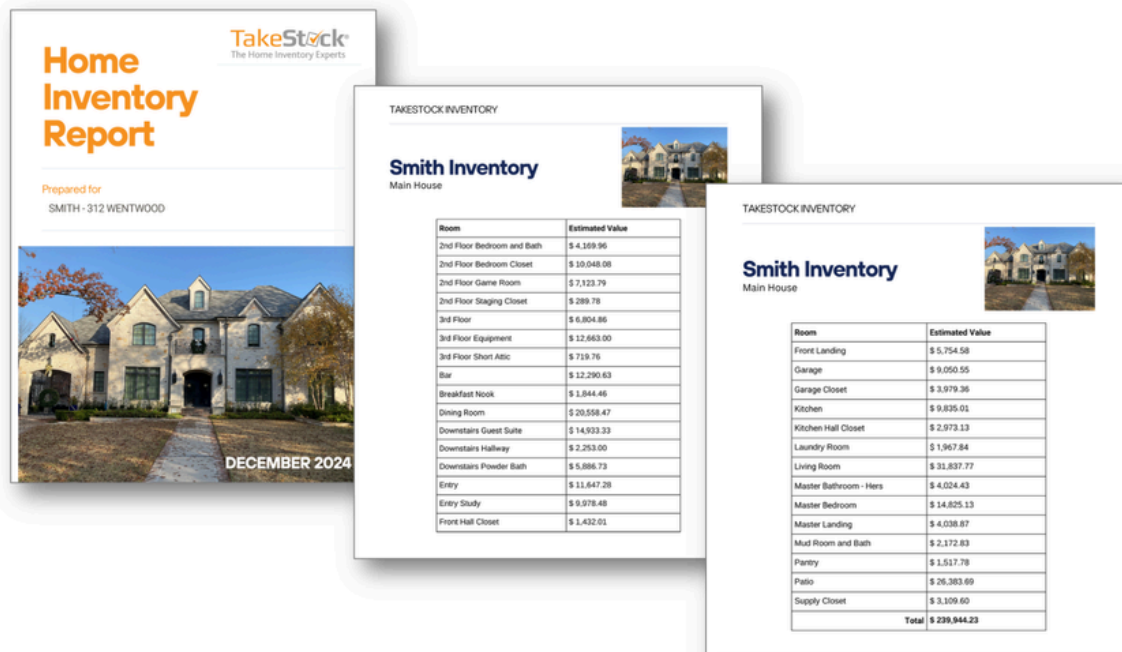
**Secure
Access
from Any
Location**



**Detailed Inventory
& Estimated Values**

Professional Inventory Reports

TakeStock transforms a home's contents into organized, easy-to-use documentation. Our reports provide clients and insurance professionals with a clear record of personal property, helping support coverage reviews, ongoing documentation, and future claims should a loss occur.



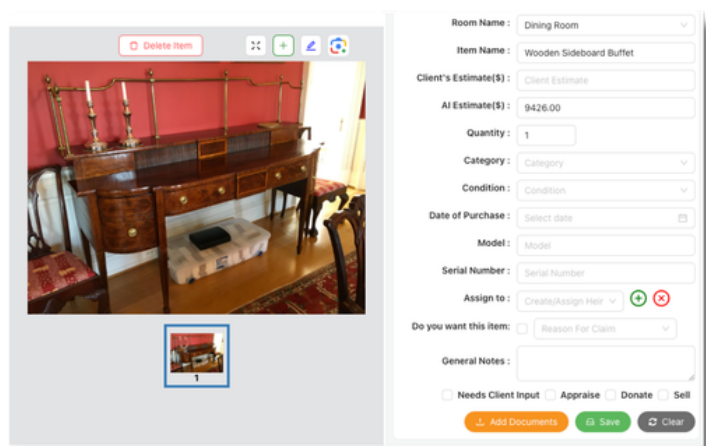
COMPLETE INVENTORY REPORT

A detailed, room-by-room record of documented personal property, including photographs, item descriptions, categories, and estimated replacement values. Summary pages provide a quick overview of inventory by room and estimated total contents value.

Organized • Searchable • Photo-driven • Available electronically

Reports That Support Better Coverage Decisions

TakeStock transforms a home's contents into organized, easy-to-use documentation. Our reporting tools help homeowners and insurance professionals better understand personal property, identify high-value items, and organize information that supports informed coverage discussions and future claims documentation.



The screenshot shows the TakeStock app interface. On the left is a photo of a wooden sideboard buffet. To the right is a form for item details. The form includes fields for Room Name (Dining Room), Item Name (Wooden Sideboard Buffet), Client's Estimate (\$), AI Estimate (\$), Quantity (1), Category, Condition, Date of Purchase, Model, Serial Number, Assign to (Create/Assign Item), and a checkbox for 'Do you want this item?'. At the bottom are buttons for 'Add Documents', 'Save', and 'Clear'.



The screenshot shows the Smith Inventory report for the Main House. It includes a table with Room and Estimated Value columns. The table lists various rooms and their estimated values, totaling \$239,944.23.

Room	Estimated Value
Front Landing	\$5,754.58
Garage	\$9,050.55
Garage Closet	\$3,979.36
Kitchen	\$9,835.01
Kitchen Hall Closet	\$2,973.13
Laundry Room	\$1,967.84
Living Room	\$31,837.77
Master Bathroom - Hers	\$4,024.43
Master Bedroom	\$14,825.13
Master Landing	\$4,038.87
Mud Room and Bath	\$2,172.83
Pantry	\$1,517.78
Patio	\$26,383.69
Supply Closet	\$3,109.60
Total	\$239,944.23

HIGH-VALUE PROPERTY SUMMARY

Quickly identify jewelry, artwork, collectibles, firearms, musical instruments, antiques, and other items that may warrant additional review or scheduled coverage.

HOME CONTENTS VALUE SUMMARY

View estimated replacement values by room and for the entire home, helping clients and advisors better understand overall contents exposure.

BETTER DOCUMENTATION. GREATER CONFIDENCE.

Help clients better understand what they own while providing organized documentation that supports insurance reviews, policy updates, and claims preparation.

Frequently Asked Questions

When should a client schedule?

The best time is **before a loss occurs**. Completing a professional inventory before a loss occurs helps clients better understand their belongings, review their insurance coverage, and maintain organized documentation should they ever need to file a claim.

How long does a typical project take?

Every home is unique. Project timing depends on the property's size, the quantity of personal belongings, and the level of documentation requested.

Will this help assess whether my client has sufficient coverage for their belongings?

A TakeStock inventory provides estimated replacement values and organized documentation to help clients understand the value of their personal property. While it doesn't offer insurance advice, the information aids discussions about coverage with insurance professionals.

Can reports be customized?

Yes. Reports can be tailored to meet each client's needs and may include complete inventory reports, room-by-room summaries, high-value property reports, valuation summaries, and other customized documentation.

Do you travel?

Yes. We proudly serve clients throughout Texas and are available for projects in other locations. Please contact us to discuss your specific needs.

Still Have Questions?

We're always happy to discuss a specific client situation before a referral is made.

Meet the Team

TakeStock combines personal service, innovative technology, and an organized field process to help homeowners document, understand, and protect their personal property.



Marian Haggard Bryan

Founder & CEO

Marian founded TakeStock after recognizing how often homeowners underestimate the value of their personal property until they experience a loss. She is passionate about helping families create organized inventories that support better insurance planning, simplify documentation, and provide greater peace of mind.



Michael Tacker

Chief Operating Officer

Michael oversees TakeStock's operations, technology, reporting systems, and service delivery. He works closely with insurance professionals and homeowners to ensure every inventory is completed accurately, securely, and in a format that's both practical and easy to use.

Together, Marian and Michael help insurance professionals deliver an added level of service by helping clients document and protect what matters most.

Refer a Client or Contact TakeStock

You do not need to know exactly which TakeStock service a client needs before contacting us.

If a client would benefit from a better understanding of their personal property or simply wants to be better prepared before a loss—we're happy to discuss their situation and recommend the most appropriate service.

REFER A CLIENT OR DISCUSS A SITUATION

Phone

844-929-2669

Email

info@takestockinventory.com

Website

www.takestockinventory.com

You focus on protecting your clients.

We'll help them document what they own, better understand the value of their personal property, and maintain organized records that support insurance reviews and future claims.

Preserving Memories. Protecting Assets.

