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**Gail Perry** • May. 22, 2017



When you're thinking about your insurance needs, where do you turn? We wondered if there were apps to help us and started doing some research. Here's what we found, with the help of some of our members of the *CPA Practice Advisor* community.

Here's my favorite so I'll start with this. I am a book lover and have a large library. If there were a fire in my home, the books would probably be the first to go, so having an inventory would be spectacular. I found the **BookBuddy** app and discovered that

recording an inventory of my books is as easy as scanning bar codes. For older books

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**Know Your Stuff.** This app allows you to record and store lists of all of your belongings, organized by room and property. Stored in the cloud, the reports from this app will be useful should you need to make an insurance claim.

Similarly, an app called **Sortly** creates home (and business) inventory lists. In addition, the app is designed to help with moves by creating checklists and barcodes for each box you pack. Not only will you be able to find things quickly after you have packed, but should a box get lost in your move, you'll know exactly what is missing. Sortly allows you to track collectibles along with valuations. The inventory information downloads automatically into Evernote.

And speaking of **Evernote**, **Tom Hood**, president and CEO of the Maryland Association of CPAs uses Evernote to list his home inventory. "Having my home inventory in Evernote with its date and time stamping was critical to establishing my losses. Then photos of damage and clean-up documented the claim as well as subsequent follow-up."

We have one more home inventory app to recommend and that is Liberty Mutual's **Home Gallery – Household Inventory**. You don't need to be a Liberty Mutual customer to use this free app. With Home Gallery, you can take photos of your belongings, assign details, scan bar codes, and record price information including pictures of receipts. Inventory can be exported as an attached CSV or PDF file and then you can easily search the inventory for any information you need.

Switching gears, as it were, to automobile insurance, **Sandra Wiley**, President of Boomer Consulting, recommends State Farm Insurance's **Drive Safe and Save** app. "I have it on my phone, and it connects to a device in my car. Then, I get a price break when it shows I am driving safely. It tracks my speed, how many miles I drive, etc.... It has worked very well for our family, and has reduced our insurance rates quite a bit."

**Tom Hood** also relies on State Farms’s **Pocket Agent** insurance app. “I have my State

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videos, organized by the milestone events in your life (marriage, childbirth, vacations, family events), but it also provides a secure cloud location where you can store images of important documents – warranty deeds, automobile titles, insurance policies, wills, kind of like a virtual safe deposit box. (Obviously these copies won’t take the place of the original documents, but having an easy place where you can view them can be handy.)

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