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RESIDENCE MAINTENANCE CHECKLIST

For many, the American Dream is synonymous with home ownership. But the dream can become a nightmare when those who enjoy the home are unable to care for it. This can happen in a variety of ways. With couples, often one person is responsible for the majority of home ownership chores, and that person might become unable or unavailable to continue in that role. Or an elderly person hoping to live out their life in their home might need assistance from a child or friend in the home's day-to-day management. Or a vacation home may be held in trust for descendants, with a trustee having the duty to maintain it. Advance planning can help. What follows is a list of information to keep in one place and to maintain over time to assist the residence's caretaker in their duties.

Access:

- Who has a key to the home?
- Is there a security system guarding the home? If so, how is it operated and who is the contact person (name, phone, email). Is there a password?
- Is there a pool? A hot tub? Sauna? Is there a fence with a lock? If so, who has a key?
- Is there a neighbor who can watch the house and has access to the house?
- Are there any pets in the home? If so, what are their names? Who can take care of them while you are unable to do so? What veterinarian do you use? (name, phone, email)
- What else does the caretaker need to know about?

Insurance:

- Regarding homeowner's insurance, where is the policy located?
- Issued by what company? (name, contact person, phone, email). When does it renew?
- Is there an EV charging port at the home? Does insurance cover any damage it might cause? Who installed and maintains it?
- What other insurance is applicable to the home?

Indoor Maintenance:

- Is there a cleaning service? (name, contact information, phone, email)
- Does home utilize town sewer system or septic tank? If septic tank, who do you use for maintenance?
- How does water come into the home? If metered, where is the meter? Is there a well? If so, who maintains the well?
- Is there a plumber you use? (name, contact information, phone, email)
- Is there an electrician you use? (name, contact information, phone, email)
- What company services your heating unit and air conditioning? (name, contact information, phone, email)



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- Does home use heating oil? If so, where is oil tank located? Who maintains it? Is there a scheduled delivery?
- Does the home use gas? Who is the gas company and where is meter located?
- Is there a basement? Does the basement have a moisture issue? If so, is there a dehumidifier and where is it located? Is there a sump pump system or other pump system? Where is it located and who maintains it? (name, contact information, phone, email)
- Who supplies WiFi? (name, contact information, phone, email) Do you have routers around the home? What is the WiFi address and password?
- Who supplies telephone service? (name, contact information, phone, email)
- Who supplies television service? (name, contact information, phone, email)
- How do you get your entertainment – do you subscribe to any apps such as Max, Netflix, etc.? What are the passwords?
- What type of trash service to you have? How often is pick-up and what day. (Include information on recycling, landfill trash, and composting).
- Any other household help? What else should the caretaker know about?
- Is there a safe in the house? Who knows the combination?
- Is there a working fireplace in the home? How many? Who maintains it?
- Are there smoke detectors? Carbon monoxide detectors? What is the maintenance schedule?

Outdoor Maintenance:

- Are there additional structures on the property other than the home? What are they?
- Is there a homeowners association? Or a condo association? Who is the contact person?
- Is there a landscaping service? Separate tree service? (name, contact information, phone, email)
- Does your landscaping include an underground sprinkler system? If so, who maintains it?
- Is there a pool (or hot tub) maintenance service? (name, contact information, phone, email)
- Is there a snow removal service? (name, contact information, phone, email)
- Do you have a driveway? Is there underground heating? Who maintains it?
- When was the roof last replaced?
- Who maintains the gutters?
- Who washes the windows?
- Are there solar panels on the home or property? Who maintains them?
- Are there any stonewalls? Who maintains them?
- Any other outdoor help?
- What else should the caretaker know about?

Mortgage and Real Estate Taxes:

- Is there a mortgage on the home, or a line of credit, or both? (amount, contact information at financial institution, phone, email)
- Where is the real estate tax bill sent? Your home? Your office?