Tallihaus

The House Binder

Everything about your home in one place: where the shutoffs are, what's installed, when it was serviced and who did the work.

PHOTO OF YOUR HOME

ADDRESS

OWNERS

MOVED IN

IF FOUND, PLEASE CALL

How to use this binder

You don't need to fill it all in at once. Start with the emergency pages, then add the rest as things come up.

A few tips

- [ ] **Do the emergency pages first.** Find the water shutoff and map the breaker panel before you need them, not during a leak.
- [ ] **Take photos of labels.** Model and serial numbers are on a sticker on each appliance. A photo is faster than copying them.
- [ ] **Print more of the pages you use most.** The logs, appliance pages and inventory are made to be printed again.
- [ ] **Keep it where anyone can find it.** A kitchen shelf or near the breaker panel. Tell the people you live with where it is.
- [ ] **Don't write passwords or full account numbers.** The last four digits are enough to find an account.
- [ ] **Selling someday?** Buyers love getting the systems, maintenance and paint pages. Keep the money pages for yourself.

What's inside

Start here

Your first month 3

Home basics

Your home at a glance 4
Key numbers 5
Paint and finishes 6

Emergency

Shutoffs and safety 7
Breaker panel map 8
Emergency contacts 9
If something goes wrong 10

Systems and appliances

Appliance log 11
How old is it? 12
Heating and cooling 13
Water heater and plumbing 14
Roof, outside and windows 15
Warranty tracker 16
Sizes and spare parts 17
What's coming up 18

Maintenance

Every month 19
Spring and summer 20
Fall and winter 21
The year at a glance 22
Maintenance log 23

Projects and money

Home improvement log 24
Contractors 25
Comparing quotes 26
Project planner 27
Yearly home costs 28

Records

Utilities and accounts 29
Home inventory 30
Where important papers are 31

Notes

Notes 32

Your first month

The things worth doing right after you move in, roughly in order. Write the date when each one is done.

First day

- [ ] **Change the locks and garage codes** — DATE
  Past owners, agents and contractors may still have keys.
- [ ] **Find the water shutoff and breaker panel** — DATE
  Mark them on the Shutoffs and safety page.
- [ ] **Test smoke and CO alarms** — DATE
- [ ] **Photograph the meters** — DATE
  Your starting readings, in case a first bill looks wrong.
- [ ] **Photograph every room before you unpack** — DATE
  A record of the shape the house was in when you got it.

First week

- [ ] **Replace the furnace filter** — DATE
  Write the size on the Sizes and spare parts page.
- [ ] **Set the water heater to about 120°F** — DATE
  Hot enough for most homes, and lowers the risk of scalding.
- [ ] **Map the breaker panel and fill in the emergency contacts** — DATE
- [ ] **Put a fire extinguisher in the kitchen** — DATE
- [ ] **Clean the dryer vent** — DATE
  You don't know when it was last done.
- [ ] **Learn trash and recycling days** — DATE

First month

- [ ] **Ask your county about a homestead or owner tax break** — DATE
  Many have a sign-up deadline.
- [ ] **Note your first mortgage payment date** — DATE
  It's usually a month or two after closing. Don't miss it.
- [ ] **Change your address everywhere** — DATE
  Driver's license, voter registration, bank, insurance, employer.
- [ ] **Book furnace and AC service if there are no records** — DATE
- [ ] **Find the appliance manuals** — DATE
  Search the model number online for a free PDF.
- [ ] **Find out how old everything is** — DATE
  The How old is it? page shows how to read the label.
- [ ] **Keep your closing papers in one safe place** — DATE

Your home at a glance

Most of this is on your listing, inspection report or county property record.

YEAR BUILT	SQUARE FEET	LOT SIZE	STORIES

BEDROOMS	BATHROOMS	GARAGE	PARCEL NUMBER

How it's built

FOUNDATION

☐ Full basement ☐ Crawl space ☐ Slab

BASEMENT

☐ Finished ☐ Unfinished ☐ Partly ☐ None

ROOF TYPE AND COLOR

SIDING

WINDOWS

FLOORING

How it runs

HEAT

☐ Gas furnace ☐ Heat pump ☐ Electric ☐ Boiler
☐ Oil / propane

COOLING

☐ Central AC ☐ Heat pump ☐ Window units
☐ None

WATER

☐ City ☐ Well

SEWER

☐ City ☐ Septic

WATER HEATER

☐ Gas tank ☐ Electric tank ☐ Tankless
☐ Heat pump

ELECTRICAL SERVICE

☐ 100 amp ☐ 150 amp ☐ 200 amp ☐ Other

Good to know about this house

Quirks, tricks and things the last owner told you

Key numbers

Who to call about the house itself. Write only the last four digits of account and loan numbers.

Mortgage

LENDER OR LOAN SERVICER

LOAN NUMBER (LAST 4)

PHONE

MONTHLY PAYMENT

DUE DAY

INTEREST RATE

PAID OFF IN (YEAR)

TAXES AND INSURANCE IN ESCROW?

☐ Yes ☐ No

Homeowners insurance

COMPANY

POLICY NUMBER (LAST 4)

AGENT AND PHONE

CLAIMS PHONE

RENEWS ON

DEDUCTIBLE

FLOOD INSURANCE?

☐ Yes ☐ No

SEWER BACKUP COVERAGE?

☐ Yes ☐ No

Property tax

COUNTY

YEARLY TAX

DUE DATES

WHERE TO PAY OR APPEAL

HOMESTEAD OR OTHER TAX BREAK FILED?

☐ Yes ☐ No

HOA

If you have one

NAME AND MANAGER

PHONE

DUES

DUE

PORTAL OR WEBSITE

When you bought

PURCHASE PRICE

CLOSING DATE

TITLE COMPANY

Paint and finishes

For touch-ups and matching later. The color code is on the lid of the can.

Room	Wall color and brand	Code	Sheen	Trim and ceiling	Flooring
Living room					
Kitchen					
Dining room					
Primary bedroom					
Bedroom					
Bedroom					
Bathroom					
Bathroom					
Hallways and stairs					
Basement					
Laundry					
OUTSIDE					
Siding					
Trim					
Front door					
Deck or fence stain					

Other finishes

COUNTERTOPS

CABINETS

CABINET HARDWARE

TILE AND GROUT COLOR

CAULK COLOR

LIGHT BULBS (TYPE, COLOR)

Tip: Keep a small labeled jar of each paint color. Cans that freeze in a garage can go bad.

Shutoffs and safety

Walk the house once and find each of these. Tape a photo in the box, or draw a quick arrow.

Main water shutoff

WHERE

TURN WHICH WAY

PHOTO

Gas shutoff

WHERE

TOOL NEEDED

PHOTO

Electrical panel

WHERE

MAIN BREAKER SIZE

PHOTO

Water heater

WHERE

SHUTOFF VALVE

PHOTO

Sump pump

WHERE

BACKUP OR ALARM?

PHOTO

Outdoor faucet shutoffs

WHERE

HOW MANY

PHOTO

Fire extinguishers

WHERE

EXPIRES

PHOTO

Smoke and CO alarms

WHERE

REPLACE BY (DATE ON BACK)

PHOTO

If you smell gas, leave first

Get everyone out, then call the gas company or 911 from outside. Shut the gas off only if it's safe and you know how. Only the gas company should turn it back on.

Breaker panel map

Flip one breaker at a time while someone calls out what went dark. Most panels number odd on the left and even on the right.

PANEL LOCATION _____ PANEL BRAND _____ MAIN BREAKER (AMPS) _____

#	Amps	What it controls	#	Amps	What it controls
1			2		
3			4		
5			6		
7			8		
9			10		
11			12		
13			14		
15			16		
17			18		
19			20		
21			22		
23			24		
25			26		
27			28		
29			30		
31			32		
33			34		
35			36		
37			38		
39			40		

Tip: A breaker that keeps tripping is a warning, not a nuisance. Call an electrician instead of resetting it over and over.

Emergency contacts

For anything life-threatening, call 911 first. Poison Control is 1-800-222-1222 anywhere in the U.S.

Who	Name or company	Phone	Notes
UTILITIES			
Electric Outages and downed lines			
Gas Leaks, 24 hours			
Water and sewer			
Internet			
HELP WITH THE HOUSE			
Insurance claims			
Plumber			
Electrician			
Heating and cooling			
Roofer			
Water damage cleanup			
Handyman			
PEOPLE			
Neighbor			
Has a spare key			
Family contact			
Non-emergency police			

If something goes wrong

What to do first, before help arrives. Take photos before you clean up: your insurance company will ask for them.

Gas smell

1. Don't flip switches, light anything or start a car in the garage.
2. Get everyone out. Leave the door open behind you.
3. Call the gas company or 911 from outside, away from the house.
4. Wait until they say it's safe to go back in.

Burst pipe or big leak

1. Turn off the main water shutoff.
2. Turn off power to wet rooms at the panel, but only if you can reach it without standing in water.
3. Open a low faucet to drain the pipes.
4. Call a plumber, then your insurance company.

Power outage

1. Check your breaker panel, and whether neighbors are out too.
2. Report it to the electric company.
3. Unplug computers and TVs so a surge doesn't hit them.
4. Keep the fridge closed. Food stays safe about 4 hours; a full freezer about 48.
5. Never run a generator indoors or in the garage.

No heat in winter

1. Check the thermostat setting and its batteries.
2. Check the breaker and the furnace switch (it looks like a light switch near the furnace).
3. Change the filter. A clogged one can shut the furnace down.
4. Still nothing? Call for service, and let faucets drip if it's below freezing.

Sewer or drain backup

1. Stop running water and flushing toilets.
2. Keep people and pets out of the water. It isn't safe to touch.
3. Call a plumber.
4. Call your insurance company. Many policies cover this only with a sewer backup add-on.

Storm damage

1. Stay far away from downed power lines.
2. Take photos and video of the damage first.
3. Stop more damage if it's safe: tarp, towels, buckets. Keep the receipts.
4. Call your insurance company. Be wary of door-to-door contractors who want a big deposit.

Appliance log

One box per appliance. The label is usually inside the door, on the back, or behind the bottom panel. Print as many as you need.

APPLIANCE | BRAND | INSTALLED OR BOUGHT

MODEL NUMBER | SERIAL NUMBER

WHERE BOUGHT | PRICE | WARRANTY ENDS | FILTER OR PART NUMBER

SERVICE AND NOTES

APPLIANCE | BRAND | INSTALLED OR BOUGHT

MODEL NUMBER | SERIAL NUMBER

WHERE BOUGHT | PRICE | WARRANTY ENDS | FILTER OR PART NUMBER

SERVICE AND NOTES

APPLIANCE | BRAND | INSTALLED OR BOUGHT

MODEL NUMBER | SERIAL NUMBER

WHERE BOUGHT | PRICE | WARRANTY ENDS | FILTER OR PART NUMBER

SERVICE AND NOTES

How old is it?

Age is the best clue to how much life something has left. Here's how to find it from the label, even when no date is printed.

- [ ] **Look for a printed date first.** "MFG date," "DOM" (date of manufacture) or "Mfd," usually near the serial number.
- [ ] **No date? Find the serial number** and look up the brand below. Write what you find on the appliance page and the What's coming up page.

Brand	How to read the serial number	Example
Rheem, Ruud Water heaters, furnaces, AC	The first four digits are the month and year.	**Q0815…** = August 2015
A.O. Smith, State Water heaters	The first four digits are the year, then the week.	**1734…** = 2017, week 34 (late August)
Carrier, Bryant, Payne Furnaces and AC	The first four digits are the week, then the year.	**2317…** = week 23 of 2017 (early June)
Trane, American Standard Furnaces and AC, 2010 and newer	The first four digits are the year, then the week.	**1932…** = 2019, week 32 (early August)
Goodman Furnaces and AC	The first four digits are the year, then the month.	**1606…** = June 2016
LG Appliances	The first digit is the last digit of the year. The next two are the month.	**905…** = May 2019
Frigidaire, Electrolux Appliances	Skip the first two letters. The next digit is the last digit of the year, then two digits for the week.	**BA723…** = 2017, week 23 (June)
Bosch, Thermador Appliances	Look for "FD" on the label. Add 1920 to the first two digits for the year; the last two are the month.	**FD 9505** = May 2015

GE

Appliances

The first letter is the month and the second letter is the year. Both use the same twelve letters. Example: `HR…` = May 2020.

A	D	F	G	H	L	M	R	S	T	V	Z
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2013 · 25	2014 · 26	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024

A one-digit year repeats every 10 years (GE letters every 12), so pick the one that fits the house. Not every model follows these patterns. If the answer looks wrong, call the maker with the serial number.

Short on time? The Tallihaus app reads the label from a photo and works out the age for you.

Heating and cooling

The filter size is printed on the edge of the old filter. Most filters need changing every 1–3 months.

Furnace or air handler

BRAND

YEAR INSTALLED

MODEL NUMBER

SERIAL NUMBER

FILTER SIZE

CHANGE EVERY

INSTALLED BY

Air conditioner or heat pump

BRAND

YEAR INSTALLED

MODEL NUMBER

SERIAL NUMBER

SIZE (TONS)

WARRANTY ENDS

INSTALLED BY

THERMOSTAT

HUMIDIFIER PAD OR FILTER

USUAL SERVICE COMPANY

Service record

Date	What was done	Who	Cost

Water heater and plumbing

Most tank water heaters last 8–12 years. Flushing one every year clears out the sediment that wears it down.

Water heater

BRAND

YEAR INSTALLED

MODEL NUMBER

SERIAL NUMBER

SIZE (GALLONS)

WARRANTY ENDS

LAST FLUSHED

ANODE ROD CHECKED

Other plumbing

SUMP PUMP AGE

BATTERY BACKUP?

WATER SOFTENER

SALT TYPE

WATER FILTER CARTRIDGE

CHANGE EVERY

SEPTIC LAST PUMPED

SEPTIC COMPANY

Service record

Date	What was done	Who	Cost

Roof, outside and windows

The big, expensive parts. Knowing their ages helps you plan before they need replacing.

Part	Year	Material or brand	Installed by	Warranty until
Roof Lasts about 20–25 years				
Gutters and guards				
Siding				
Windows				
Front door				
Other outside doors				
Garage door				
Garage door opener				
Deck or patio				
Driveway				
Fence				
Sprinklers				
Chimney				

Notes

Window sizes, shingle color, gate codes

Warranty tracker

Every warranty on one page, so nothing runs out without you noticing.

Home warranty plan

If you have one

COMPANY

PHONE

CONTRACT (LAST 4)

RENEWS ON

SERVICE FEE

WHAT IT DOESN'T COVER

Item	Company	What it covers	Ends	Paperwork kept

Sizes and spare parts

The numbers you need at the hardware store. Take a photo of the old one before you go.

Item	Size or part number	Where to buy	Keep on hand
Furnace filter Printed on the edge			
Humidifier pad			
Fridge water filter			
Range hood filter			
Whole-house water filter			
Air purifier filter			
Smoke alarm batteries			
CO alarm batteries			
Thermostat batteries			
Garage remote batteries			
Light bulbs, main rooms			
Outdoor light bulbs			
Specialty bulbs Ceiling fan, oven, fridge			
Toilet flapper Brand and size			
Faucet cartridges			
Window screen sizes			

Where the meters are

ELECTRIC METER

GAS METER

WATER METER

What's coming up

The big replacements, planned ahead. Fill in the year each one went in to see when it's likely due and what to set aside.

Item	Life (years)	Typical cost	Year installed	Likely due	Save per month
Roof (asphalt shingles)	20–25	$10,000–15,000			
Furnace	15–20	$4,000–7,000			
Air conditioner or heat pump	12–15	$5,000–9,000			
Water heater (tank)	8–12	$1,500–2,500			
Refrigerator	10–15	$1,200–2,500			
Range or oven	13–15	$900–1,800			
Dishwasher	9–12	$700–1,200			
Washing machine	10–12	$800–1,300			
Dryer	10–13	$700–1,200			
Microwave	8–10	$300–600			
Garbage disposal	8–12	$250–400			
Sump pump	7–10	$500–800			
Garage door opener	10–15	$400–700			

Example: your water heater went in in 2017. They usually last 8–12 years, so plan for one around 2027. If that's 12 months away and a new one costs about $1,800, set aside $150 a month.

The next five years

What's likely due, and roughly what it costs

Year	What's likely due	Estimate

Rough 2026 U.S. prices with basic installation. Get local quotes when it's time.

Every month

Ten minutes, once a month. Check a box as you go.

Task	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Test smoke and CO alarms	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Check the furnace or AC filter	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Look under sinks for leaks	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Run water in sinks and showers you rarely use	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Clean the garbage disposal	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Clean the range hood filter	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Check the fire extinguisher gauge	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Pour a bucket of water in the sump pit to test the pump	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Walk around outside and look for anything new	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Why run water in unused drains? Each drain has a water trap that blocks sewer gas. If it dries out, you'll smell it.

Spring and summer

Write the date when it's done, so next year you'll know when you last did it.

Spring

- [ ] **Clean gutters and downspouts** — DATE _____
  Make sure downspouts send water several feet from the house.
- [ ] **Have the AC serviced** — DATE _____
  Before the first hot week, when service companies get busy.
- [ ] **Look over the roof from the ground** — DATE _____
  Missing or curling shingles after winter. Binoculars help.
- [ ] **Turn on outdoor faucets and check for leaks** — DATE _____
  A pipe that froze over winter often leaks inside the wall.
- [ ] **Check caulk and paint outside** — DATE _____
  Around windows, doors and trim, where water gets in.
- [ ] **Check that the ground slopes away from the house** — DATE _____
  Fill low spots near the foundation with soil.
- [ ] **Clean window screens and tracks** — DATE _____
- [ ] **Get the mower ready** — DATE _____
  Sharpen the blade, change the oil.

Summer

- [ ] **Clean the dryer vent duct** — DATE _____
  Lint buildup is a leading cause of house fires.
- [ ] **Check the deck and railings** — DATE _____
  If water soaks in instead of beading up, it's time to seal it.
- [ ] **Trim plants away from the house and AC unit** — DATE _____
  Leave about two feet of space.
- [ ] **Look for pests** — DATE _____
  Mud tubes on the foundation can mean termites. Check for wasp nests.
- [ ] **Test the garage door's safety reverse** — DATE _____
  It should back up when something blocks it.
- [ ] **Clean the fridge coils** — DATE _____
  Under or behind the fridge. Dusty coils make it work harder.
- [ ] **Check the attic** — DATE _____
  Stains on the wood, damp insulation, or signs of animals.

Fall and winter

Most of fall is getting ready for the cold. Most of winter is watching for problems.

Fall

- [ ] **Have the furnace serviced** — DATE
  Before the first cold night.
- [ ] **Clean gutters after the leaves fall** — DATE
- [ ] **Shut off and drain outdoor faucets** — DATE
  Unhook hoses so the pipes don't freeze and burst.
- [ ] **Check weatherstripping and door sweeps** — DATE
  If you can see daylight around a door, heat is getting out.
- [ ] **Have the chimney inspected** — DATE
  Once a year if you use the fireplace.
- [ ] **Flush the water heater** — DATE
- [ ] **Change smoke and CO alarm batteries** — DATE
  An easy one to do when the clocks change.
- [ ] **Blow out the sprinkler lines** — DATE
- [ ] **Switch ceiling fans to clockwise** — DATE
  Pushes warm air back down from the ceiling.

Winter

- [ ] **Watch for ice dams** — DATE
  Big icicles along the roof edge can mean water is backing up under shingles.
- [ ] **Keep outside vents clear of snow** — DATE
  Furnace and water heater vents need air to run safely.
- [ ] **Protect pipes in a deep freeze** — DATE
  Let faucets on outside walls drip and open the cabinet doors under sinks.
- [ ] **Keep the heat at 55°F or higher when you travel** — DATE
- [ ] **Check the basement and attic for leaks** — DATE
- [ ] **Get quotes for spring projects** — DATE
  Contractors have more time in winter, and spring fills up fast.

The year at a glance

A starting point. Shift things a month or two for your climate, and add your own on the lines.

January

- [ ] Watch for ice dams
- [ ] Test the sump pump
- [ ] Clean the range hood filter

February

- [ ] Gather tax papers, incl. form 1098
- [ ] Look for drafts
- [ ] Book spring services

March

- [ ] Look for basement water
- [ ] Check the roof after winter
- [ ] Test smoke and CO alarms

April

- [ ] Have the AC serviced
- [ ] Clean gutters
- [ ] Turn on outdoor faucets

May

- [ ] Check caulk and paint outside
- [ ] Clean window screens
- [ ] Check the ground slope

June

- [ ] Clean the dryer vent
- [ ] Check the deck
- [ ] Trim plants from the house

July

- [ ] Clean the fridge coils
- [ ] Look for pests
- [ ] Test the garage door reverse

August

- [ ] Check the attic
- [ ] Seal driveway cracks
- [ ] Plan fall projects

September

- [ ] Have the furnace serviced
- [ ] Check weatherstripping
- [ ] Chimney inspection

October

- [ ] Drain outdoor faucets
- [ ] Clean gutters after leaves
- [ ] Ceiling fans to clockwise

November

- [ ] Change alarm batteries
- [ ] Flush the water heater
- [ ] Blow out sprinklers

December

- [ ] Protect pipes in cold spots
- [ ] Total up the year’s costs
- [ ] Update the home inventory

Maintenance log

Everything that gets done to the house, big or small. Print more as you fill it.

Date	What was done	Done by	Cost	Notes

Home improvement log

Upgrades and additions, like a new roof, a remodel or a deck. Not repairs.

Why keep this: it can lower your taxes when you sell

What you spend improving your home adds to what the IRS counts as your cost for the house. If your profit when you sell is more than the tax-free amount ($250,000, or $500,000 for married couples), these records lower the tax you owe. Keep the receipts with this page. Repairs and upkeep don't count.

Date	Project	Contractor	Cost	Permit	Receipt
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐

Not tax advice. Ask a tax professional about your situation.

Contractors

The people who've worked on your house, and whether you'd call them again.

TRADE _____ COMPANY _____

PERSON _____ PHONE _____

LAST JOB AND DATE _____ HIRE AGAIN? ☐ Yes ☐ Maybe ☐ No

TRADE _____ COMPANY _____

PERSON _____ PHONE _____

LAST JOB AND DATE _____ HIRE AGAIN? ☐ Yes ☐ Maybe ☐ No

TRADE _____ COMPANY _____

PERSON _____ PHONE _____

LAST JOB AND DATE _____ HIRE AGAIN? ☐ Yes ☐ Maybe ☐ No

TRADE _____ COMPANY _____

PERSON _____ PHONE _____

LAST JOB AND DATE _____ HIRE AGAIN? ☐ Yes ☐ Maybe ☐ No

TRADE _____ COMPANY _____

PERSON _____ PHONE _____

LAST JOB AND DATE _____ HIRE AGAIN? ☐ Yes ☐ Maybe ☐ No

TRADE _____ COMPANY _____

PERSON _____ PHONE _____

LAST JOB AND DATE _____ HIRE AGAIN? ☐ Yes ☐ Maybe ☐ No

TRADE _____ COMPANY _____

PERSON _____ PHONE _____

LAST JOB AND DATE _____ HIRE AGAIN? ☐ Yes ☐ Maybe ☐ No

TRADE _____ COMPANY _____

PERSON _____ PHONE _____

LAST JOB AND DATE _____ HIRE AGAIN? ☐ Yes ☐ Maybe ☐ No

Comparing quotes

For bigger jobs, get at least three. The lowest price isn't always the best deal.

PROJECT

DATE

	Quote 1	Quote 2	Quote 3
Company			
Contact and phone			
THE WORK			
Price			
What's included			
What's not included			
Materials or brand			
Start date and length			
Cleanup and haul-away			
PEACE OF MIND			
Licensed and insured Ask for proof			
Warranty on the work			
Permit included			
Deposit asked			
Reviews or references			
Gut feeling 1 to 5			

Red flags

Wants most of the money up front, takes cash only, won't put the price in writing, or pressures you to decide today.

Project planner

PROJECT

START

FINISH

WHY WE'RE DOING IT

BUDGET

ACTUAL COST

To do

- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]

Questions to ask

Materials or item	Where to buy	Qty	Cost

BEFORE

AFTER

Yearly home costs

What the house really costs to own. A common rule of thumb: set aside 1–2% of your home's value each year for upkeep.

YEAR

Month	Mortgage	Utilities	Taxes and insurance (if not in escrow)	HOA	Repairs and upkeep	Improve-ments	Total
Jan							
Feb							
Mar							
Apr							
May							
Jun							
Jul							
Aug							
Sep							
Oct							
Nov							
Dec							
TOTAL							

Looking back at the year

BIGGEST SURPRISE COST

NEXT YEAR WE SHOULD BUDGET FOR

Utilities and accounts

Every regular bill for the house. Last four digits only.

Service	Company	Account	Phone or website	Usual cost	Due	Autopay
Electric						☐
Gas						☐
Water						☐
Sewer						☐
Trash and recycling						☐
Internet						☐
Security system						☐
Lawn care						☐
Pest control						☐
Home warranty						☐
						☐
						☐
						☐

Pickup days

TRASH

RECYCLING

YARD WASTE OR BULK ITEMS

Wi-Fi and devices

Network name only. Keep passwords in a password manager.

WI-FI NETWORK

ROUTER LOCATION

GARAGE CODE HOLDER

Home inventory

For insurance claims after a fire, theft or storm. One page per room. The fastest way to start: walk each room recording a video, opening closets and drawers, and save it somewhere online.

ROOM

DATE

Item	Brand and model	Serial number	Bought	Price	Receipt	Photo
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐

Where important papers are

Keep originals in a fireproof box or safe deposit box, and a scanned copy somewhere online.

Document	Where it's kept	Scanned
Deed		☐
Closing Disclosure or settlement statement		☐
Mortgage note		☐
Title insurance policy		☐
Survey or plot plan		☐
Home inspection report		☐
Seller's disclosure		☐
Homeowners insurance policy		☐
Flood insurance policy		☐
Home warranty contract		☐
Property tax bills		☐
Permits and plans		☐
Appliance manuals and warranties		☐
Improvement receipts		☐
HOA rules and documents		☐
Will or trust		☐
		☐
		☐

Notes

Rather keep this on your phone?

The free Tallihaus app keeps your appliances, upkeep checklist and reminders, bills and mortgage in one place. It reads appliance labels and bills with your camera, so there's less to type.

Scan to get the free app