

YOUR BUSINESS NAME

Phone · Email · Website

First Walk-Through Worksheet

Fill this in with the owner as you walk the home together, in the order you'd walk it on a visit. Photograph each shutoff and panel as you find it. Go over it again each season.

1. Before you go in

Owner name(s)

Primary phone

Second phone

Email

Best way and time to reach you

Mailing address while away

Leaving on

Returning on

Anyone staying while you're away (who and when)

Insurance company and agent phone

Who to call when there's a problem, in order:

Name	Relationship	Phone	Has a key?

2. Arriving

Write codes on Part B of the service agreement, not here.

Community or HOA

HOA or manager contact

Gate instructions

Door you'll use

Lockbox location

Alarm panel location

How to arm and disarm

3. Outside, walking around

Home type (house, condo, villa)

Outdoor taps and hose bibs

Irrigation controller and schedule

Pool or spa equipment

Generator: where, fuel, how to start

Shutters or panels stored at

Dock, boat or lift

Gutters, trees or cracks to keep an eye on

4. Garage and utility areas

Main water shutoff

Electrical panel

Gas shutoff

Water heater (type and location)

Vehicles or golf cart left here, and whether to start them

Spare filters, bulbs and fuses

Water softener or filter

5. Kitchen and laundry

Refrigerator (on or off, setting)

Ice maker (on or off)

Sink and dishwasher shutoffs

Washing machine shutoffs

6. Bathrooms

Toilets and showers to run each visit

Known leaks, stains or slow drains

7. Living areas and bedrooms

Blinds (open or closed)

Lights on timers

Rooms to skip or keep closed

Things not to move or touch

8. Heating and cooling

Air handler location

Filter size

Thermostat while away (°F)

Humidity setting or dehumidifier

A/C company

Last serviced

9. The owner's service people

Service	Company or person	Phone	Schedule
Lawn			
Pool			
Pest control			
A/C			
Plumber			
Electrician			
Handyman			
Cleaning			
Alarm monitoring			

10. Anything else
