

YOUR BUSINESS NAME

Phone · Email · Website

Client Intake Sheet

Fill this in with the homeowner at the first walk-through. Update it each season.

Owner

Name(s)	_____	Primary phone	_____
Second phone	_____	Email	_____
Mailing address while away	_____	Best way and time to reach you	_____

Contact order when there is a problem

Name	Relationship	Phone	Has a key?

Property

Address	_____	Community or HOA	_____
HOA or manager contact	_____	Gate instructions	_____
Home type (house, condo, villa)	_____	Pool or spa	_____
Generator	_____	Dock, boat or lift	_____
Vehicles or golf cart left here	_____	Shutters stored at	_____

Where things are

Main water shutoff	_____	Electrical panel	_____
Gas shutoff	_____	Water heater	_____
A/C air handler	_____	A/C filter size	_____
Irrigation controller	_____	Spare fuses, bulbs, filters	_____

Settings while you are away

Thermostat (°F)	_____	Humidity setting	_____
Water heater (on / off)	_____	Main water (on / off)	_____
Ice maker (on / off)	_____	Lights on timers	_____
Blinds (open / closed)	_____	Refrigerator (on / off)	_____

Service providers

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

Dates

Leaving on	_____	Returning on	_____
Anyone staying while you are away (who and when)	_____	Insurance company and agent phone	_____

Anything else we should know
