

PROTECTING YOUR LEGACY

We want to be prepared for when the time comes; to step in and take care of everything just the way you do now. You are not obligated to share all the following information however, the more you do, the easier the transition will be for us later down the road. If there's anything that comes to mind that isn't included in the following questions, there is a section at the end where you can include your own notes.

Year Home was Built:

Year of new roof if applicable:

Year of latest hot water tank install:

Year of last furnace serviced:

Fireplace: Date of last chimney sweep/inspection:

Company you use for chimney sweep/inspection:

Supplier for firewood:

Preferred landscaper/gardener:

Preferred irrigation technician:

Snow removal:

Pest control:

Painter:

Window cleaner:

Cleaner:

Gutter cleaner:

Driveway maintenance:

Home Insurance company:

Home Insurance costs:

Mortgage Company:

Mortgage Costs:

Property tax amount:

Stata Fees:

Electric Company:

Aprox amount of Electric Bill in Summer:
bill in winter:

Approx amount of electic

Water Company:

Approx amount of water bill in summer:
bill in winter:

Approx amount of water

Internet provider:

Pool / Hot Tub maintenance:

Mechanic/ Electrician/ Plumer:

Pets & Livestock

Pets:

Please include: Name, Gender, Age, Type of Animal, Food brand and type, treats brand and type, veterinarian, pet sitter, dog walker, feeding amount and schedules. Exercise routine.

Livestock

Name, gender, type of animal, feed: brand and type preferred store, Hay: type: preferred supplier, Veterinarian, or contacts of neighbors who are capable of helping.

Anything Else about the Home or Property you would like to share that could be helpful?