

HOMEOWNER RECORDBOOK

Everything you need to maintain, document & protect your home

PREPARED FOR

PROPERTY ADDRESS

CLOSING DATE

YOUR OWN FILLABLE COPY

Download a digital version you can type into, save and update:

yourmovemymissionpa.com/recordbook

Works on a computer, tablet or phone, or print any page.

Your Move. My Mission.

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Prepared for your ownership years by Anne McCausland, REALTOR®

A Note From Anne

Hello, and thank you!

Thank you for trusting me with one of the biggest moves of your life. Whether you bought your first home, your forever home, or a getaway for weekends and holidays, being part of your story is the best part of my job.

There is something new every homeowner should know about. Beginning November 2, 2026, mortgage appraisals across the country move to a redesigned report (the URAR) built on the new Uniform Appraisal Dataset, UAD 3.6, from Fannie Mae and Freddie Mac. It is a nationwide reporting change, not a Pennsylvania law, but Pennsylvania homeowners will start seeing it. The new report asks for much more specific detail about your home: its improvements, condition, measurements, and features.

That is exactly why I created this recordbook. Keeping up with your documentation is part of guarding your home's value, and waiting until you need or want to sell can feel like the night before April 15th. Fill in a page when something happens, not all at once. Type right into the digital copy, or print a page and write it by hand. Store paper receipts in a safe place, and also scan each receipt and save it to your Google Drive or another cloud account. Visit the seasonal pages as the weather changes.

My door is always open. If you need a contractor recommendation, wonder what your home is worth, or are thinking about your next move, call or text me anytime. If a friend or family member is thinking about a move, I would be honored to take care of them the way I took care of you.

Thank you again. Enjoy every season in your home.

Warmly,

Anne McCausland, REALTOR®

Keller Williams Real Estate | Hawley, PA
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HOW TO USE THIS BOOK

- On screen: click any box and type, then save. Text shrinks to fit each box.
- On paper: print any page blank and write by hand.
- Need more pages? Print extra copies of any page, or use the add-ons at the back.
- Privacy: write only the last 4 digits of account numbers.
- This is a record-keeping tool, not an appraisal or legal, tax or insurance advice.

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Property Information

Important details about your home

PROPERTY ADDRESS

Street address

City | State | ZIP

PROPERTY DETAILS

Property type

- ☐ Single family
- ☐ Condo
- ☐ Townhouse
- ☐ Multi-family
- ☐ Second / seasonal home
- ☐ Other

Year built | Square footage | Lot size

Bedrooms | Bathrooms | Stories

Garage / parking | Parcel / tax ID | Municipality

APPRAISAL-READY QUICK FACTS

Roof last replaced | Front door height above ground | Furnace / heat below grade?

- ☐ Broadband internet available
- ☐ Converted space (e.g., garage)
- ☐ Waterfront or water access
- ☐ Finished basement
- ☐ Space not reached from main unit
- ☐ Other buildings (see Add-On A1)

PURCHASE & CLOSING

Date purchased | Title company | Real estate professional | Phone / email

Notes

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Mortgage & Insurance

Summary information only. Keep full account numbers private

MORTGAGE SUMMARY

Lender / servicer | Phone | Account # (last 4)

Loan type | Origination date | Payment due day | Escrow? (Y / N)

HOMEOWNERS INSURANCE

Insurance company | Agent name | Agent phone

Policy # (last 4) | Renewal date | Deductible | Dwelling coverage

Policy type

- ☐ HO-3
- ☐ HO-5
- ☐ Dwelling / DP form
- ☐ Landlord / rental
- ☐ Seasonal / vacancy
- ☐ Other

FLOOD, UMBRELLA & OTHER COVERAGE

- ☐ In a flood zone
- ☐ Separate flood policy
- ☐ Umbrella liability
- ☐ Water / sewer backup

Flood policy company & renewal

Umbrella company & renewal

COVERAGE LIMITS

Coverage	Limit	Deductible
Dwelling / building		
Other structures		
Personal property		
Loss of use		
Personal liability		
Medical payments		

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Property Tax & Community Dues

Installments and paid checkboxes for taxes and community dues

PROPERTY TAX

Year	Installment / due date	School Tax	County / Municipal	Paid
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐

COMMUNITY DUES

Year	Installment / due date	Amount due	Notes	Paid
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐

Notes (association contact, special assessments, upcoming projects, gate / amenity access)

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Utility & Service Directory

Who serves your home and where the shutoffs are

UTILITY & SERVICE DIRECTORY

Service	Provider & phone	Meter / shutoff location	Who owns the tank / equipment?	Last verified
Electricity				
Propane				
Heating oil				
Water				
Septic / sewer				
Internet				
Phone / TV				
Trash / recycling				
Solar / energy				
Generator				
Other				
Other				
Other				

Write no full account numbers or passwords here. Date each entry when you verify it.

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Operating Costs

A yearly record of what the home costs to run

YEARLY HOUSEHOLD OPERATING COSTS

Year	Electric	Heat fuel	Water / sewer	Trash	Internet / TV	Other

Notes (how the home is used: year-round, seasonal, weekends, rental; thermostat habits)

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Trusted Professionals

Contractors and service providers you rely on

TRUSTED PROFESSIONALS

Trade / service	Company	Contact name	Phone	Email / website	Last used
Plumber					
Electrician					
HVAC					
Roofer					
General contractor					
Landscaper					
Snow removal					
Septic / well					
Painter					
Mason					
Handyman					

Ask for references and written estimates. File licenses, insurance certificates and contracts behind this tab.

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Emergency Contacts

Keep these numbers handy and current

EMERGENCY & SERVICE CONTACTS

Service	Name	24-hour phone	Non-emergency	Notes
Fire department				
Police				
Ambulance / EMS				
Poison control				
Electric outage				
Propane emergency				
Water utility				
Septic / sewer				
Emergency plumber				
Electrician				
HVAC repair				
Locksmith				
Property manager				
Neighbor / key holder				
Other				

WHERE TO SHUT THINGS OFF

Main water shutoff _____

Electrical panel _____

Propane shutoff _____

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Home Systems

Heating, cooling, hot water, electrical and plumbing

HEATING & COOLING

Type & fuel

Brand / model

Installed (approx.)

Serial #

Installed by

Equipment location

Filter size & location

Service company / phone

Last / next service

WATER HEATER

Type & fuel

Brand / model & size

Installed (approx.)

Location

Service company / phone

Last / next service

ELECTRICAL

Service size (amps)

Panel brand

Panel location

Updated (approx.)

Electrician / company

Generator hookup / transfer switch?

PLUMBING & SAFETY

Pipe material

Water treatment

Sump pump?

Smoke / CO detector locations

Fire extinguisher locations

Notes

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Well, Septic & Drainage

Water source, sewer type and water management

WATER SOURCE

- [ ] Public
- [ ] Community / shared
- [ ] Private well

Provider / system name

Well location (if private)

Pump / tank replaced

Treatment equipment & service

Water test dates & results

SEWER / SEPTIC

- [ ] Public sewer
- [ ] Community sewer
- [ ] Private septic

Tank size & material

Tank / cleanout location

Installed or replaced

Last pumped

Next pumping due

Service contractor / phone

Permit / plan on file? Where?

Last inspection

DRAINAGE & WATER MANAGEMENT

- [ ] Sump pump
- [ ] Battery backup
- [ ] Grading / French drain
- [ ] Flood vents
- [ ] Dehumidifier
- [ ] Gutter extensions

Past water intrusion, repairs and reports (dates, what was done, who did it)

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Appliances & Warranties

Inventory, serial numbers and warranty dates

APPLIANCE INVENTORY & WARRANTY TRACKER

Appliance	Brand / model	Serial #	Year installed	Warranty ends	Warranty provider / phone	Manual / receipt location
Refrigerator						
Freezer						
Range / oven						
Cooktop						
Microwave						
Dishwasher						
Disposal						
Washer						
Dryer						
Water heater						
Furnace						
A/C or heat pump						
Water treatment						
Sump pump						
Generator						
Other						
Other						

Photograph each model / serial plate. Set a reminder before a warranty ends.

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Spring Maintenance

Wake the home up after winter

Year _____ Home address _____

SPRING CHECKLIST	DATE DONE
☐ Inspect roof, flashing & chimney	
☐ Clean gutters & downspouts	
☐ Service A/C or heat pump	
☐ Test smoke & CO detectors	
☐ Check decks, railings & stairs	
☐ Inspect windows, screens & seals	
☐ Check foundation grading & drainage	
☐ Service well / septic as scheduled	
☐ Inspect dock, wall & shoreline structures	
☐	
☐	
☐	

Notes

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Summer Maintenance

Keep up with heat, humidity and outdoor living

Year

Home address

SUMMER CHECKLIST	DATE DONE
☐ Clean dryer vent	
☐ Check caulk at tubs, showers & exterior	
☐ Clean ceiling fans	
☐ Check attic ventilation	
☐ Trim growth off roof & siding	
☐ Clean / stain deck as needed	
☐ Test GFCI outlets	
☐ Check basement / crawlspace for moisture	
☐ Review emergency plan & contacts	
☐	
☐	
☐	

Notes

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Fall Maintenance

Get ready for the cold months

Year

Home address

FALL CHECKLIST	DATE DONE
☐ Service furnace / boiler	
☐ Clean gutters after leaf drop	
☐ Seal gaps at windows & doors	
☐ Clean chimney / fireplace / stove	
☐ Drain hoses, shut off outdoor spigots	
☐ Insulate exposed pipes	
☐ Stock ice melt & snow tools	
☐ Test generator	
☐ Replace detector batteries	
☐	
☐	
☐	

Notes

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Winter Maintenance

Protect the home through snow and ice

Year

Home address

WINTER CHECKLIST	DATE DONE
☐ Check furnace filter monthly	
☐ Clear snow & ice from walks and vents	
☐ Watch for ice dams	
☐ Check pipes in unheated areas	
☐ Test sump pump	
☐ Keep vents & registers clear	
☐ Inspect fire extinguishers	
☐ Review insurance coverage	
☐ If unoccupied: confirm heat & check-ins	
☐	
☐	
☐	

Notes

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Maintenance & Repair Log

Record every service, repair and upgrade

MAINTENANCE, REPAIR & SERVICE LOG

Home address

Year

Date	Service / repair	What was done	Performed by	Cost	Receipt / warranty notes

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Rooms & Ceilings

Room uses, floors and updates needed

ROOM LIST & CEILINGS

List every room, finished or unfinished. The appraiser measures; this page explains differences between the listing, tax record and measured size.

Room / space	Floor	Ceiling height	Approx. size	Updates needed
Kitchen				
Living room				
Primary bedroom				
Primary bath				

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Kitchen Updates

What changed in the kitchen and when

KITCHEN UPDATE HISTORY

Describe the work factually: what, when and with what. If a date is unknown, write "approx."

Item / area	Year completed	What was replaced or changed	Materials & finishes	Contractor or DIY	Invoices / photos / permit
Cabinets					
Countertops					
Sink & faucet					
Appliances					
Flooring					
Backsplash					
Lighting					
Plumbing					
Electrical					
Walls & paint					
Windows					

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Bathroom Updates

What changed in each bathroom and when

BATHROOM UPDATE HISTORY

Describe the work factually: what, when and with what. If a date is unknown, write "approx."

Bathroom / item	Year completed	What was replaced or changed	Materials & finishes	Contractor or DIY	Invoices / photos / permit
Primary: vanity & sink					
Primary: tub / shower					
Primary: toilet					
Primary: floor & tile					
Hall bath: vanity					
Hall bath: tub / shower					
Hall bath: toilet					
Hall bath: floor					
Half bath					
Fans & lighting					

Notes

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Roof, Exterior & Systems

Dates, scope and materials for the big-ticket items

ROOF, EXTERIOR & MAJOR SYSTEMS

Component	Year installed	Scope / what was done	Materials / make	Contractor or DIY	Permit / records
Roof					
Siding / exterior					
Windows					
Exterior doors					
Furnace / boiler					
A/C or heat pump					
Water heater					
Electrical panel / wiring					
Plumbing					
Insulation					
Deck / porch / patio					
Addition					
Conversion (e.g., garage)					
Foundation / drainage					

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Paint & Finishes

Colors, brands and sheens for easy touch-ups

PAINT & FINISHES RECORD

Room	Surface	Color name	Brand / code	Finish	Year painted	Notes

Keep leftover paint in a labeled container for touch-ups.

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Flooring & Materials

Flooring, counters, tile and other materials

FLOORING, COUNTERS & MATERIALS

Area / room	Material	Color / style	Size	Year installed	Brand	Cost	Warranty / care

Keep spare tiles or planks, labeled by room.

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Repairs Needed

What still needs doing, and when

REPAIRS NEEDED

Describe accurately. Keep invoices and inspection reports with the entry, and check "Done" when finished.

Feature / area	Location	Repair needed	Update to make	Projected date	Done
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐

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Receipts & Documents

Where each receipt and document is stored

RECEIPTS & DOCUMENTS: WHERE EVERYTHING IS STORED

Record where each paper or digital file lives (binder tab, folder, cloud drive).

Category	Document / item	Year	Stored where	Notes
Repairs				
Repairs				
Appliances				
Appliances				
Renovations				
Renovations				
Projects				
Projects				
Warranties				
Permits & approvals				
Inspections & reports				
Insurance				
Closing documents				
Photos				

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Water Access & Rights

Lake, dock and community rights tied to this property

WATER ACCESS & PROPERTY RIGHTS

How is access to the water held?

- ☐ Deeded to this lot
- ☐ Permit / membership
- ☐ Privately owned
- ☐ Shared / community
- ☐ Not applicable

Right to build (dock, etc.)

Waterfront length (feet)

Permit / license # & holder

Water depth / type

- ☐ Shallow
- ☐ Deep
- ☐ Non-navigable

View

- ☐ Full
- ☐ Partial
- ☐ Seasonal

Dock / mooring / lift details

Lake or community rules

LAND & RIGHTS

- ☐ Land under home is commonly owned
- ☐ Owner maintains ALL exterior
- ☐ Nonresidential use exists
- ☐ Rights excluded from sale (mineral, timber, water)

Your lot's individual rights versus shared amenities, and where the documents are

Notes

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Major Purchase Tracker

Purchases, warranties and dates

MAJOR PURCHASE TRACKER

Item	Brand / model	Store / supplier	Date	Price	Warranty ends

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Home Inventory & Valuables

Protect what matters most

HOME INVENTORY & VALUABLES

Prepared by _____ Date completed _____ Where this record is stored _____

Room / category	Item (brand, model)	Qty	Est. value (each)	Year bought	Photo / receipt? Where	Serial # / notes

F

Storage of this inventory

__ Fireproof safe __ Safety-deposit box __ Cloud / digital __ Other

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Insurance Claims Log

Dates, amounts and status of every claim

INSURANCE CLAIMS LOG

Insurer _____ Policy # (last 4) _____ Agent / phone _____

Incident date	Type of loss	Damage description	Claim # (last 4)	Filed	Paid ($)	Status

Keep with this log

- ☐ Incident report
- ☐ Photos
- ☐ Repair estimates
- ☐ Adjuster notes
- ☐ Receipts / invoices

Follow-up notes

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Other Buildings

Garages, sheds, decks, porches and more

OTHER BUILDINGS, DECKS & AMENITIES

Structure	Year built / changed	Gross size	Finished / unfinished	Rooms	Heat / cool	Utilities extended	Permit
Detached garage							
Shed							
Workshop							
Guest structure							
Boathouse							
Deck							
Porch							
Patio							

Size: deck / porch / patio

Fireplaces / stoves

Other amenities

Notes

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Solar, Energy & Storm Protection

Ownership, ratings and protective features

ENERGY SYSTEMS

Installed

- [ ] Solar panels
- [ ] Battery storage
- [ ] Wind equipment
- [ ] Generator
- [ ] EV charger
- [ ] Other

Ownership arrangement

- [ ] Owned
- [ ] Leased
- [ ] Power purchase agreement
- [ ] Financed

Installer | Install date | System size | Service contact

Where the agreement is kept | Lease / loan end date

CERTIFICATIONS & RATINGS

- [ ] Green-building certification
- [ ] HERS rating
- [ ] WaterSense products
- [ ] ENERGY STAR products

Documentation location | Rating / date

STORM & DISASTER PROTECTION

- [ ] Flood vents
- [ ] Impact-resistant glass
- [ ] Storm shutters
- [ ] Sump with battery backup
- [ ] Roof straps / ties
- [ ] Other

Notes

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Close the House

Winterizing and closing checklist

Year

Home address

CLOSE THE HOUSE	DATE
☐ Set thermostat to the minimum your pro recommends	
☐ Shut off main water or follow your plumbing plan	
☐ Drain lines & fixtures as advised	
☐ Turn off & drain water heater per manufacturer	
☐ Treat traps per your plumber	
☐ Empty & prop refrigerator; remove perishables	
☐ Secure windows, doors & garage	
☐ Arrange snow removal & a check-in contact	
☐ Notify insurer of vacancy if required	
☐ Store dock, boat lift & outdoor furniture	
☐ Photograph shutoffs & settings	
☐	
☐	

Closed on

Check-in contact / phone

Notes

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Open the House

Reopening checklist for the season

Year _____ Home address _____

OPEN THE HOUSE	DATE
☐ Inspect for leaks, pests & storm damage	
☐ Restore water slowly; check every fitting	
☐ Restart water heater	
☐ Test smoke & CO detectors	
☐ Replace HVAC filter	
☐ Run faucets; flush toilets	
☐ Test sump & well pump	
☐ Restart appliances	
☐ Inspect roof & gutters	
☐ Install dock & set out furniture	
☐ Reconnect internet / TV	
☐	
☐	

Reopened on _____ Check-in contact / phone _____

Notes

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Custom Log, Page 1

Type your own column titles

CUSTOM LOG: TYPE YOUR OWN COLUMN TITLES

Click any dark column title and type over it.

Log title

Date started

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6

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Custom Log, Page 2

Type your own column titles

CUSTOM LOG: TYPE YOUR OWN COLUMN TITLES

Click any dark column title and type over it.

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6

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Notes & Reminders, Page 1

Extra space for anything else

NOTES, SKETCHES & REMINDERS

Notes

Notes & Reminders, Page 2

Extra space for anything else

NOTES, SKETCHES & REMINDERS

Notes

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