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FIRST-YEAR HOMEOWNER CHECKLIST

HOME | CLOSING DATE | MORTGAGE SERVICER AND LOAN NO.

FIRST 30 DAYS

- ❑ Store deed and closing papers safely
- ❑ Check homestead exemption (county)
- ❑ Confirm what escrow pays
- ❑ Register appliance warranties
- ❑ Note home warranty end date
- ❑ Make a home inventory with photos
- ❑ Build a home emergency kit
- ❑ Start a home repair fund

EVERY MONTH

- ❑ Test smoke and CO alarms
- ❑ Check HVAC filter, change if dirty
- ❑ Look under sinks for leaks

SPRING

- ❑ Clean gutters and downspouts
- ❑ Service the air conditioner
- ❑ Check roof, siding and caulk

SUMMER

- ❑ Clean the dryer vent duct
- ❑ Check deck, fence and grading
- ❑ Look for pests and termites

FALL

- ❑ Service furnace or heat pump
- ❑ Drain outside faucets
- ❑ Seal drafts at doors, windows

WINTER

- ❑ Flush the water heater
- ❑ Test GFCI outlets
- ❑ Replace alarm batteries yearly

BEFORE THE FIRST YEAR ENDS

- ❑ Builder walk-through (new build)
- ❑ Review insurance before renewal
- ❑ Check escrow statement and tax bill
- ❑ File receipts for improvements

Key dates and yearly costs

Item	Company / account	Due or renews	Yearly cost	Notes
Property tax				
Homeowners insurance				
Flood or other insurance				
HOA dues				
Home warranty				
Mortgage (12 payments)				
Total yearly cost				

NOTES (REPAIRS TO PLAN, QUOTES, QUESTIONS FOR THE COUNTY OR LENDER)