

Homeowner File Checklist



Keep documentation for:

- ☐ **Contractor invoices**

Major repairs, replacements and improvements

- ☐ **Contractor bids and estimates**

Including substantial bids for work you did not complete

- ☐ **Permits and final approvals**

Keep both the original permit information and documentation showing that the permit was finalized or closed out

- ☐ **Improvement and replacement receipts**

Roof, windows, heating systems, sewer work, remodeling and other major projects

- ☐ **Warranty information**

Including transferable warranties and instructions

- ☐ **Maintenance and service records**

Heating systems, sewer maintenance, chimney service, roof work and other recurring maintenance

- ☐ **Before, during and after photos**

Especially for work that will eventually be hidden

- ☐ **Professional reports**

Inspections, sewer scopes, engineering reports, arborist reports, surveys and other property evaluations

- ☐ **Plans and drawings**

Remodel plans, surveys, engineering drawings or other property plans

- ☐ **Paint and finish information**

Paint brand, color name/code and finish, plus flooring, tile, countertops and other materials you may need to match later

- ☐ **Appliance and equipment information**

Receipts, manuals, model numbers and warranties

- ☐ **Insurance documentation**

Records related to significant claims or repairs

Create one main folder called: HOME RECORDS

Organize documents by major system or project, such as:

Roof | Electrical | Plumbing + Sewer | Heating + Cooling | Permits | Remodeling | Warranties | Reports | Photos

Tip: Take photos before, during and after major projects, especially when the work will be hidden behind walls, flooring or landscaping