

Property and Family Checklist

Managing a household and keeping your family's most important details organized can feel like a circus act. This checklist is designed to be your single source reference, ensuring nothing slips through the cracks—whether it's routine maintenance or an unexpected emergency.

1. The Master Vault (Vital Documents)

Lose the paper trail, lose your mind. Keep these in a fireproof, waterproof safe or a highly secure, encrypted digital drive.

- **Identity Docs:** Birth certificates, passports, social security cards, marriage licenses, and adoption papers.
- **Property Deeds & Titles:** Home deed, vehicle titles, and land surveys.
- **Estate Planning:** Wills, living trusts, healthcare proxies, and power of attorney documents.
- **Financial Records:** Tax returns (past 3–7 years), active loan documents, and investment account details.

2. The Digital & Financial Lifeline

If something happens to you, can your partner or trusted family member access the grid?

Password Manager: Set up a master account (e.g., 1Password, Bitwarden) with an emergency access contact designated.

The "In Case of Emergency" (ICE) Cheat Sheet: A secure document listing:

- Bank names and account types.
- Utility providers (Water, Gas, Electric, Trash) with account numbers.
- Subscription services that auto-bill.

3. Property & Maintenance Hub

Your home is likely your biggest asset. Protect it with a proactive schedule.

Season	Exterior Tasks	Interior Tasks
Spring	Clean gutters; inspect roof; check outdoor faucets for leaks.	Deep clean carpets; test smoke/CO detectors; service the A/C.
Summer	Wash siding/windows; inspect deck/patio for damage; trim trees.	Check attic for pests; clean dryer vent lint trap/pipe.
Autumn	Rake leaves; clean gutters (again); drain outdoor hoses.	Service the furnace; sweep the chimney; check window seals.
Winter	Clear snow from pathways; watch for ice dams on the roof.	Test sump pump; check pipes in unheated areas; test water softener.

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The Home Inventory: Take a 10-minute video walking through every room of your house, opening closets and drawers. Upload it to the cloud. If you ever need to file an insurance claim, this video is worth its weight in gold.

4. Family Health & Wellness Tracker

Keep everyone's medical baselines and histories in one easy-to-grab folder.

- **Insurance Cards:** Digital copies or physical photocopies of medical, dental, and vision cards.
- **Medical History:** A brief log for each family member detailing blood types, allergies, major surgeries, and chronic conditions.
- **Immunization Logs:** Up-to-date vaccine records (crucial for school registration and international travel).
- **The Provider Rolodex:** Primary care doctors, pediatricians, dentists, and veterinarians.

5. Insurance & Emergency Readiness

Because "hoping for the best" isn't a strategy.

Coverage Checkup: Review your Homeowners/Renters, Auto, and Life insurance policies annually to ensure coverage limits match current asset values.

The 72-Hour "Go-Bag": Kept near an exit or in the car trunk.

- Water (1 gallon per person per day) and non-perishable food.
- First-aid kit and a 7-day supply of critical medications.
- Flashlights, extra batteries, and multi-tools.
- A small amount of cash in small denominations.

The Family Rally Point: Establish two meeting spots in case of an evacuation: one right outside the house (e.g., a specific neighbor's tree) and one outside the neighborhood (e.g., a local library).

6. The "Pet Asset" Checklist

Don't forget the four-legged family members.

Microchip Data: Keep the microchip number and the registry website written down.

Vaccine Proof: Especially rabies certificates, which are required for boarding or emergency shelters.

Care Instructions: A written 1-page guide on feeding schedules, medication, and behavioral quirks in case a pet sitter needs to take over instantly.



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