

01 Annual & Seasonal Maintenance



A practical checklist for the routine tasks that help protect your home, prevent surprises, and keep major systems running well.

MAINTENANCE TASK	FREQUENCY	DATE COMPLETED	NOTES
Change HVAC filter	Every 1–3 months	☐ _____	
Clean gutters	Spring & fall	☐ _____	
Service HVAC system	Annually	☐ _____	
Check smoke detectors	Twice per year	☐ _____	
Flush water heater	Annually	☐ _____	
Inspect roof	Annually	☐ _____	
Inspect weather stripping	Annually	☐ _____	
Test sump pump	Annually	☐ _____	
Check caulking (kitchen/bath)	Annually	☐ _____	
Clean dryer vent	Annually	☐ _____	
Wash dryer lint screen	Twice per year	☐ _____	
Sprinkler system (outside shutoff)	Annually	☐ _____	

HOMEOWNER TIP Add service dates as you go. A simple record can make future maintenance, repairs, and replacement planning much easier.

02 Home Information & Systems



Keep the details you are most likely to need during service calls, repairs, replacements, or future home projects in one easy-to-find place.

ADDRESS _____	YEAR BUILT _____
PURCHASE DATE _____	BUILDER _____

KEY SYSTEMS & EQUIPMENT

SYSTEM / EQUIPMENT	BRAND	MODEL / SERIAL #	LAST SERVICED	NOTES
HVAC				
Water Heater				
Furnace				
AC Unit				
Washer				
Dryer				
Kitchen – Refrigerator				
Kitchen – Range / Oven				
Kitchen – Dishwasher				
Kitchen – Microwave				
Kitchen – Other				
Fireplace				
Garage Door				
Water Softener				

03 Important Contacts



Create a quick-reference list of the professionals and service providers you trust, so you are not searching for a phone number when something needs attention.

SERVICE	COMPANY / NAME	PHONE / EMAIL
Builder		
HVAC		
Plumber		
Electrician		
Handyman		
Irrigation / Landscaping / Lawncare		
Exterminator		
Pool		

KEEP IT CURRENT

Update this page whenever you change providers, service a major system, or replace equipment. Keep the log somewhere easy to access when you need it.