InfoChest Home

Free Worksheet Sample

Three practical pages to get started.

Home Profile - record the essentials about your property.

Seasonal Review - note observations and next actions.

Emergency Information - keep key contacts and shutoffs together.

Print and complete these pages for your own household. Keep emergency information somewhere accessible but protect sensitive details.

The complete Home Planning Companion Pack contains all 27 worksheets, the Repair-or-Replace guide and the 10-Year Financial Plan. It is offered separately and included with the paid Excel Home Management System.

The free Home Planning Calculator is a separate downloadable tool.

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01 HOME PROFILE

CORE WORKSHEET Start here or revisit regularly.

Create the basic identity of the home. Complete once, then update when facts change.

Field	Entry	Field	Entry
Address / Property		Home type	
Year built		Year purchased	
Occupancy		Approx. size	
Stories		Bedrooms / baths	
Heating type		Cooling type	
Water source		Sewer / septic	
Electrical service		Foundation type	
Garage / parking		Key access notes	
Insurance provider		Policy / contact	
Emergency contact		Preferred contractor source	

What I know / what I don't know

Known	Unknown / needs research

Last verified

Date: By:

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14 SEASONAL REVIEW

USE WHEN NEEDED Complete this only when it is relevant to your home.

Use the seasons as review points, not as a substitute for condition-based maintenance.

Season	What I will review	Findings	Follow-up	Due
Spring	Roof/exterior, drainage, water intrusion, winter damage, exterior systems			
Summer	Exterior, cooling, deck/balcony, drainage, projects			
Fall	Heating, gutters, drainage, winter readiness, safety			
Winter	Heating, indoor moisture, ice/snow risks, emergency readiness			

Condition-triggered observations

Observation	Asset	Action	Review date

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27 EMERGENCY INFORMATION

CORE WORKSHEET Start here or revisit regularly.

Put the information you are most likely to need under pressure in one place.

Emergency item	Location / information
Main water shutoff	
Main electrical disconnect / panel	
Gas shutoff (if applicable)	
Furnace / boiler emergency information	
Sump pump / backup power	
Fire extinguisher locations	
Smoke / CO alarm locations	
Emergency contact	
Insurance contact / policy	
Preferred urgent contractor	
Water / sewer emergency contact	
Key / access information	

Immediate priorities

If there is an active hazard, leave the situation to the appropriate emergency service or qualified professional. Do not use this page as a substitute for emergency procedures.

Last verified

Date: By:

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