YOUR NEW HOMEOWNER GUIDEBOOK

house to *home*





Turning your house into your *home*

Welcome home! In this guide, you will find my trusted vendor list, maintenance tracker, and logs to seamlessly manage your new home.



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Home Info List

PROPERTY ADDRESS

PURCHASE PRICE

DATE OF PURCHASE

MORTGAGE LENDER

ACCOUNT #

INSURANCE COMPANY

POLICY #

HOA INFORMATION

WARRANTY INFORMATION

SECURITY SYSTEM INFORMATION

New Homeowner Checklist

SECURITY & SAFETY

- [ ] Change the locks
- [ ] Reprogram garage door code
- [ ] Set up a home security system
- [ ] Replace batteries in smoke & carbon monoxide detectors
- [ ] Locate the main water shutoff valve
- [ ] Locate the circuit breaker

ADMIN & UTILITIES

- [ ] Transfer or set up utilities
- [ ] Arrange internet and cable services
- [ ] Redirect mail
- [ ] Notify bank and credit card companies
- [ ] Submit your Homestead exemption
- [ ] Update address on driver's license
- [ ] Update address on insurance policies & voter registration



Home Maintenance Checklist

- [ ] Check and replace air filters
- [ ] Clean gutters and downspouts to prevent clogging
- [ ] Inspect plumbing for leaks, drips, or water stains
- [ ] Test smoke and carbon monoxide detectors
- [ ] Know the location of your fire extinguisher and how to use it
- [ ] Inspect windows/ doors for air leaks. Apply weatherstripping or caulking
- [ ] Clean dryer vent to prevent fire and improve efficiency
- [ ] Clean appliances, including dishwasher filter and range hood filters
- [ ] Check water heater for rust or corrosion. Flush to remove sediment



Maintenance Tracker

MAINTENANCE PERFORMED

DATE

COST

PERFORMED BY

MAINTENANCE PERFORMED

DATE

COST

PERFORMED BY

MAINTENANCE PERFORMED

DATE

COST

PERFORMED BY

Systems & Appliance Info

APPLIANCE/SYSTEM	MODEL/ SERIAL #	PURCHASE DATE	COST	NOTES

Paint Tracker

LIVING ROOM

KITCHEN

DINING ROOM

LAUNDRY ROOM

PRIMARY BEDROOM

EXTERIOR

BODY:

TRIM:

DOOR:

GARAGE:

DECK:

OFFICE

POWDER BATH

SPARE BEDROOM

Vendor Contacts

SERVICE	NAME	PHONE	WEBSITE
CLEANING COMPANY	Daysie Matute	919-236-5447	daysiematute39@hotmail.com
CABINETRY	Don Oberg	919-698-9142	cabinetbargains@gmail.com
CONTRACTOR	Profile Building Co	631-813-7010	profilebuildinggroup@gmail.com
ELECTRICAL	Mike Kay	919-201-2041	bassbuster@aol.com
FENCING	Seegars Fence	919-876-1016	seegarsfence.com
HANDYMAN	Steve Lavenets	919-417-0281	stevelavenets@gmail.com
HVAC	AirServe	919-933-7080	aireserv.com
INTERIOR DESIGNER	Linden Creek	919-307-9434	linden-creek.com
LAWN CARE	Barreras Landscaping	984-234-1050	barreraslandscapingtreeservice.com
PLUMBING	Terry Baker	919-599-7828	
POOL	Pool Professionals	919-787-7878	poolprofessionals.com



Managing Finances as a Homeowner

Create a budget to manage house related expenses. Include your mortgage payment, insurance, property taxes, and utilities.

Set up a maintenance fund. Owning a home can come with unexpected expenses, like a leaky roof or broken appliance. To prepare, move dollars each month to a high-yield savings account. Estimate 1% of your purchase price in maintenance costs annually.

Understand your mortgage. Understand the terms of your mortgage, including the interest rate, payment schedule, and any prepayment penalties. Keep an eye on interest rates. Consider refinancing if rates drop 1% lower than your current rate. Understand your potential savings with Fannie Mae's Mortgage Refinance Calculator.

Consider making extra payments. Making extra payments on your mortgage can help you pay off your loan faster and save money on interest in the long run (by 5 or 6 figures!). Check with your lender to see if there are any prepayment penalties.

Shop around for homeowners insurance. Homeowners insurance can be expensive, so it's important to shop around for the best rates annually. Make sure to compare coverage and deductibles from multiple providers before choosing a policy.

Plan for property taxes. Property taxes can be a significant expense for homeowners so be sure to plan for them in your budget. You may be able to deduct property taxes from your income taxes - work with a tax professional on this.



Always know what your home is worth

Your home is likely one of your *biggest assets*, and staying informed about its value is key to responsible ownership.

Online estimates often miss important details, so for the most accurate valuation, reach out to me anytime for a quick, personalized market analysis.

I'm here to support you beyond the sale —whether it's answering questions or helping when you're ready to move on to your next home.



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