# THE HOME LEGACY PLAN

## A Home & Estate Readiness Checklist

Helping make one of life's most difficult transitions a little easier for the people you love.

Your home may be one of your family's largest assets. This checklist is designed to help organize the information your family may eventually need to manage, maintain or sell your property.

### 1. GET THE LEGAL HOUSEKEEPING IN ORDER

Consult with a qualified North Carolina estate-planning attorney and review:

☐ Current recorded deed
☐ Last Will and Testament
☐ Revocable or irrevocable Trust, if applicable
☐ Durable Power of Attorney
☐ Healthcare Power of Attorney
☐ Executor named in the Will
☐ Successor executor identified
☐ Trustee and successor trustee identified
☐ Beneficiaries reviewed and updated

#### Ask your attorney:

"If I become incapacitated, who has authority to handle or sell my home—and after my death, who will have that authority?"

If you have a Trust, also ask:

"Is my home actually owned by or properly connected to my Trust?"

### 2. CREATE YOUR PROPERTY FILE

Keep these documents together in a secure location and make sure the appropriate family member knows where to find them.

☐ Deed
☐ Owner's title insurance policy
☐ Property survey
☐ Mortgage information
☐ Property tax information
☐ Homeowners insurance
☐ Flood insurance/elevation certificate, if applicable
☐ HOA/POA information

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☐ Architectural documents or floor plans
☐ Septic/well information, if applicable
☐ Permits for additions or major improvements
☐ Appliance and equipment warranties
☐ Window and Door Warranty & Descriptions
☐ Termite bond/pest-control information
☐ Utility provider information
☐ Security-system information

## 3. CREATE A HOME IMPROVEMENT HISTORY

Record the approximate date and contractor for major improvements.

☐ Roof replacement
☐ HVAC replacement
☐ Water heater
☐ Windows and doors
☐ Kitchen renovations
☐ Bathroom renovations
☐ Flooring
☐ Exterior painting
☐ Crawlspace improvements
☐ Plumbing/electrical improvements
☐ Addition or structural modifications
☐ Other major improvements

Keep receipts, warranties and invoices whenever possible.

## 4. PREPARE THE HOME

Walk through the property periodically and identify:

### TAKE CARE OF NOW

Safety concerns, active leaks, moisture problems, wood rot, HVAC issues and significant deferred maintenance.

### PLAN FOR LATER

Painting, flooring, landscaping and other cosmetic improvements that could eventually improve marketability.

### PROBABLY DON'T NEED

Major renovations that may never provide enough return to justify the investment.

## 5. MAKE A PLAN FOR PERSONAL PROPERTY

The house may be easier to sell than everything inside it.

☐ Identify family heirlooms
☐ Identify items promised to family members
☐ Document valuable collections
☐ Determine what can eventually be donated
☐ Identify an estate-sale company if appropriate
☐ Begin downsizing items no longer needed

## 6. CREATE AN ACTIVE LIST OF TRUSTED SERVICE PROVIDERS

Include websites, contact information, monthly fees

☐ Landscaper
☐ Pest Services
☐ HVAC Service
☐ Plumber
☐ Electrician
☐ Handyman
☐ Cable & Internet
☐ Gas
☐ Electric
☐ Water / Sewer

## 7. BUILD YOUR HOME LEGACY TEAM

Record the contact information for:

☐ Executor
☐ Successor Trustee
☐ Estate-planning attorney
☐ CPA/tax professional
☐ Financial advisor
☐ Insurance agent
☐ Real estate professional
☐ HOA/POA contact
☐ Trusted contractor/handyman
☐ Family member who will coordinate the property

# YOUR “WHEN THE TIME COMES” PAGE

**Complete one final page for your family**

The person responsible for my home is: _____

My important documents are located: _____

My estate attorney is: _____

My real estate agent is: _____

My insurance agent is: _____

My HOA/POA contact is: _____

Important things to know about my home:

_____

_____

# CREATE YOUR PERSONAL HOME LEGACY PLAN

Every home—and every family—is different.

I would be happy to meet with you for a complimentary Home & Estate Readiness Review to help you create a Personal Home Legacy Plan for your property.

We’ll review the real-estate side of your plan, organize the information your family may eventually need, discuss your home’s current condition and value, and identify the steps that could make a future transition or sale easier.

You’ve worked hard to create your legacy. Let’s make it easier for your family to protect it.

This Home Legacy Plan is provided for educational and organizational purposes and is not legal, financial or tax advice. Estate-planning, title and tax questions should be reviewed with the appropriate licensed professionals.

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