

BASSICK ADVISORS — TRUSTS AND ESTATES

The Bassick House Binder

WHERE EVERY DETAIL MATTERS

One binder for the records every house needs — emergency and vendor contacts, insurance, utilities, school and HOA information, warranties, closing documents, shutoff locations, and a log of every improvement and repair.

PROPERTY ADDRESS

OWNER(S)

DATE STARTED

SAN FRANCISCO | BOSTON

BINDER LOCATION IN THE HOME

Print this binder, complete it by hand, and keep it where the household can find it. Review it once a year and whenever a policy, provider, or vendor changes.

Contents and how to use this binder

A house runs on details that are easy to lose: a policy number in an inbox, a shutoff valve behind a panel, a warranty that expired last month. This binder puts those details in one place, in writing, so they protect the household today and the estate tomorrow. Complete each section in pencil or pen, attach copies where a section asks for them, and note the date you last checked it.

- 1 Emergency and Vendor Contacts
- 2 Insurance Policy and Agent
- 3 Utilities
- 4 School and HOA Information
- 5 Warranties
- 6 Closing Documents
- 7 Shutoff Locations
- 8 Improvements and Repairs Log

HOW TO COMPLETE IT

- ☐ Work section by section; leave a line blank rather than guessing.
- ☐ Store originals elsewhere and note where they live; keep copies here.
- ☐ Add the date each time you update a page.
- ☐ Tell the household where the binder is kept.

A note on privacy: This binder holds sensitive account and policy references. Keep it inside the home, and share individual pages — not the whole binder — when a vendor or insurer needs one detail.

LAST FULL REVIEW (DATE AND INITIALS)

Emergency and vendor contacts

The people you need in an urgent moment, on one page. For a life-threatening emergency, call 911 first; this page is for the calls that come next.

EMERGENCY CONTACTS

NAME / SERVICE	PHONE	EMAIL	NOTES

HOUSEHOLD AND FAMILY CONTACTS

NAME	PHONE	RELATIONSHIP	HAS A KEY / ALARM CODE?

ALARM COMPANY AND ACCOUNT REFERENCE

ALARM CODE LOCATION (DO NOT WRITE THE CODE)

Vendor contacts

The trades and services that keep the house running. Record who you trust, how to reach them, and what they last did here.

TRADE / SERVICE	COMPANY AND CONTACT	PHONE	LAST VISIT	NOTES
Plumber				
Electrician				
HVAC				
Appliances				
Roof / Exterior				
Landscaping				
House cleaning				
Pest control				
Locksmith				
Handyperson				
PREFERRED VENDOR NOTES				

Insurance policy and agent

Record the policy you hold and the agent who services it before you need either. Attach a copy of the declarations page behind this sheet.

INSURANCE COMPANY

POLICY NUMBER

POLICY TYPE (HOMEOWNERS / CONDO / FLOOD / UMBRELLA)

COVERAGE PERIOD

AGENT NAME

AGENCY

AGENT PHONE

AGENT EMAIL

COVERAGE SUMMARY (FROM YOUR DECLARATIONS PAGE)

COVERAGE	LIMIT	DEDUCTIBLE	RENEWAL DATE
Dwelling / structure			
Personal property			
Liability			
Additional living expense			

IF YOU NEED TO MAKE A CLAIM

CLAIMS PHONE (FROM YOUR POLICY)

CLAIM NUMBER AND DATE FILED

☐ Photograph the damage ☐ Note the date and cause ☐ Keep receipts ☐ Call your agent

Utilities

Every account that keeps the lights on and the water running. When you move or change a provider, update this page the same day.

UTILITY	PROVIDER	ACCOUNT NUMBER	PHONE	SERVICE ADDRESS / NOTES
Electricity				
Gas				
Water				
Sewer				
Trash / recycling				
Internet				
Cable / TV				
Phone (landline)				
PICKUP DAY(S) FOR TRASH AND RECYCLING		METER LOCATIONS		

Moving out? Use this page as your shut-off and transfer checklist, and keep the final account confirmations with your closing documents in Section 6.

School and HOA information

Schools and associations shape daily life and, in time, resale. Keep the contacts and the rules that matter most on this page.

SCHOOLS

SCHOOL	LEVEL	PHONE	ADDRESS / NOTES

SCHOOL DISTRICT

DISTRICT OFFICE PHONE

HOMEOWNERS ASSOCIATION (HOA)

ASSOCIATION NAME

MANAGEMENT COMPANY

MANAGER NAME

MANAGER PHONE AND EMAIL

MONTHLY / ANNUAL DUES

PAYMENT METHOD AND DUE DATE

RULES TO REMEMBER (PARKING, RENTALS, EXTERIOR CHANGES, APPROVALS)

WHERE THE HOA DOCUMENTS ARE KEPT

Warranties

What is covered, until when, and how to make a claim. Staple receipts and warranty cards behind this page, and cross an item off when its coverage ends.

ITEM / SYSTEM	BRAND / MODEL	PURCHASED	WARRANTY ENDS	PROVIDER AND CLAIM STEPS
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BUILDER / NEW-HOME WARRANTY (IF APPLICABLE)	HOME WARRANTY PLAN (IF APPLICABLE)

SERIAL NUMBERS RECORDED ON A SEPARATE SHEET? (LOCATION)

Closing documents

Your closing record proves ownership and anchors every future sale, refinance, and estate matter. Keep originals in a safe place; use this page as the map to them.

DOCUMENT INVENTORY — CHECK OFF AND NOTE THE LOCATION

- ☐ Closing Disclosure / settlement statement
- ☐ Recorded deed
- ☐ Title insurance policy (owner's policy)
- ☐ Mortgage note and lender information
- ☐ Survey / plot plan
- ☐ Homeowners insurance declarations at closing
- ☐ Seller disclosures
- ☐ HOA documents received at closing
- ☐ Appraisal
- ☐ Final walk-through record

CLOSING DATE

ORIGINALS ARE KEPT AT

CLOSING ATTORNEY / TITLE COMPANY

PURCHASE PRICE (FROM YOUR STATEMENT)

COPIES / SCANS ARE KEPT AT

LENDER AND LOAN NUMBER

For trustees and executors: Note here if the property is held in a trust or entity, and where that instrument is kept. That single line saves a family weeks later.

HELD IN TRUST / ENTITY? NAME AND DOCUMENT LOCATION

Shutoff locations

Note each location while things are calm, in words a guest or house-sitter could follow. Walk the house once with this page in hand.

SHUTOFF	LOCATION (BE SPECIFIC)	TOOL NEEDED	NOTES
Main water			
Water heater			
Gas main			
Electrical panel / main breaker			
HVAC / furnace switch			
Irrigation / exterior water			

SKETCH THE ROUTE (OPTIONAL)

Use this space to sketch the path to the main water and gas shutoffs.

FLASHLIGHT KEPT AT

WRENCH / SHUTOFF TOOL KEPT AT

If you smell gas, leave the house and call the gas provider or 911 from outside. Do not use this page to guide you back inside.

Improvements and repairs log

A dated record of the work done to the house. It supports your insurance file, answers a buyer's questions, and gives a trustee or executor a true history of the property. Attach invoices and permits behind these pages.

DATE	PROJECT / REPAIR	CONTRACTOR	COST	WARRANTY / PERMIT NOTES

Improvements and repairs log

[illegible]

Improvements and repairs log

DATE	PROJECT / REPAIR	CONTRACTOR	COST	WARRANTY / PERMIT NOTES

PAINT, FINISHES, AND WHERE THE SPARES LIVE

INTERIOR PAINT (ROOM, BRAND, COLOR)	EXTERIOR PAINT / STAIN