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Here's some fun information about your home, its approximate value, local home sales, and a peek into the current market trends.

Just as you'd get an annual physical, see the dentist once or twice a year, or meet with your accountant and/or financial advisor, getting a home wellness checkup could save you time and money. Our finances and plans change over time, and with that, our mortgage needs change as well.

I have many valuable resources for all things related to your home. I would love to help you reach your financial housing goals!

Financial:

- ☐ Contest your home's Tax Value
- ☐ Correct Deed / Ownership
- ☐ Removing Mortgage Insurance payments
- ☐ Refinancing / 2nd Mortgage / Home Equity Line of Credit
- ☐ Save you the cost of an Appraisal
- ☐ Know the Equity in your home
- ☐ Properly adding your home to your revocable trust

Improvements/Maintenance:

- ☐ Home Renovations
- ☐ Handyman-type repairs
- ☐ Landscaping, Sprinkler and Lawn Service
- ☐ License Contractors for Plumbing, HVAC, Roof, Sewer....
- ☐ Inspections i.e., Roof, Pest, Chimney

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Financial Real Estate Review Checklist

Item	Installation Date	Life span	Cost
Roof			
Furnace/AC			
Water Heater			
Appliances			
Ext paint			
Int paint			
Carpet			
Light fixtures			

Home Wealth Data

Value	Mortgage Amount	Interest rate

Home Information

Style	Beds	Baths	SF	Bsmnt	Garage	Condition	Amenities

Property Components Life Spans

Plumbing

Water Service (Public)	
Galvanized Steel	40-60 yrs
Copper	75 +yrs
Plastic	N/A
Interior Water Pipes	
Galvanized Steel	40-60 yrs
Copper	75 +yrs
Plastic	N/A
Drainage Line	
Galvanized Steel	40-60 yrs
Copper	50-75 yrs
Cast Iron	60-90 yrs
ABS/PVC	30-50+ yrs
Water Heater	
Tank water Heater	10-15 yrs
Tankless Water Heater	15- 20 yrs
In Boiler Domestic coil	15-20 yrs

Windows

Wood	50-80 yrs
Vinyl	25+ yrs
Aluminum/Steel	35-50 yrs

Deck

Wood	15-25 yrs
Composite Materials	25-35 yrs

Appliances

Refrigerator	15-20 yrs
Dishwasher	7-12 yrs
Range/Cooktop	12-20 yrs
Garbage Disposal	7-12 yrs
Washer	7-12 yrs
Microwave oven	7-12 yrs
Dryer	10-15 yrs

Roof Covering

Fiberglass Asphalt tab	16-20 yrs
Fiberglass architectural	25-35 yrs
Cedar shake/shingle	10-30 yrs
Slate	50 yrs
Synthetic slate	N/A
Metal Standing Seams	50-80 yrs
Clay/concrete tiles	50-80+yrs

Siding & Veneer

Cement Composite	50+ yrs
Vinyl	35+ yrs
Aluminum	50+ yrs
Hardboard / composite	20-30 yrs
Stucco, brick, veneers	Lifetime

Gutter/ Downspout

Aluminum	30+ yrs
Galvanized	15-25 yrs
Copper	50-80 yrs
Plastic (PVC)	15-25 yrs

Well

Submersible pump	15-20 yrs
Above Ground Pump	15-20 yrs
Steel Pressure Tank	15-25 yrs

Septic

Steel Tank	15-20 yrs
Concrete Tank	30-50 yrs
Leach field	30-50 yrs

Property Components Life Spans

Heating System

Hot air furnace (oil/gas))	15-25 yrs
Boiler	35-50 yrs
Heat pump	10-15 yrs
Electric Baseboard	15-25 yrs
In-floor radiant (electric)	15-25 yrs

Cooling System

Central Split- system	10-15 yrs
Heat Pump	10-15 yrs
Evaporative cooler	10-15 yrs

Other HVAC Components

Circulator pump	20-30 yrs
Circulator Fan	15-20 yrs
Fuel tank interior	50-80 yrs
Fuel tank exterior	30-50 yrs
Expansion tank bladder	15-25 yrs
Humidifier	7-10 yrs

Interior

Ceramic tile	
Mud-set cement board	Lifetime
Mastics (adhesive)	15-25 yrs
Plaster or Drywall	Lifetime

Flooring

Wood (solid)	Lifetime
Wood (engineered)	50+ yrs
Laminate	15-25 yrs
Linoleum	10-15 yrs
Granite/ marble	100+ yrs
Carpet	7-12 yrs

Electrical

Service Entrance Cable	25-40 yrs
Circuit breakers/fuse panel	Lifetime
Wiring (modern romex)	Lifetime
Wiring (armord/cloth)	60-80 yrs