CLIENT ONBOARDING PACKET

Four coordinated forms for onboarding, documenting and servicing a Peak Property Work client.

1	NEW CLIENT INTAKE FORM	Owner, property and service preferences
2	PROPERTY PROFILE & WALKTHROUGH	Home systems, shutoffs, vendors and property-specific notes
3	HOME CHECK-IN REPORT	Standardized visit checklist, photos, findings and follow-up
4	EMERGENCY & ACCESS AUTHORIZATION	Access method, emergency contacts and spending authority

Important: Do not place alarm codes, door codes, safe combinations or passwords on ordinary emailed forms. Record sensitive credentials only through the secure access process established with the client.

Your Property. Our Priority.

1. NEW CLIENT INTAKE FORM

Complete before service begins. Use this form to establish the client's contacts, service needs and property preferences.

Client name _____ **Date** _____

Property address _____ **Billing address** _____

CONTACT INFORMATION

Primary phone _____ **Primary email** _____

Secondary contact _____ **Secondary phone** _____

Preferred communication _____

PROPERTY USE

☐ Primary residence ☐ Second / seasonal home ☐ Frequently vacant ☐ Other

Typical occupancy _____ **Expected away dates** _____

Pets / animals on property _____

SERVICES REQUESTED

☐ Home Check-Ins ☐ Routine Home Maintenance

☐ Contractor Coordination ☐ Storm & Weather Checks

☐ Pre-Arrival Home Prep ☐ Seasonal Readiness

Selected monthly plan _____ **Requested start date** _____

PROPERTY PRIORITIES & CONCERNS

What would you most like Peak Property Work to watch, maintain or help coordinate?

Any areas, rooms, equipment or belongings PPW should not access or handle?

EMERGENCY CONTACTS

Emergency contact #1 _____ **Relationship** _____

Phone _____ **Email** _____

Emergency contact #2

Client signature: _____



2. PROPERTY PROFILE & WALKTHROUGH

Complete during the initial property walkthrough. This becomes the working reference for future visits.

Property address _____ **Walkthrough date** _____

Client name _____ **PPW representative** _____

WATER & PLUMBING

Main water shutoff location _____

Well / municipal water _____

Water heater location & type _____

Sump pump / leak sensors _____

Exterior faucets / winterization notes _____

HEATING / HVAC

System type & location _____

Normal occupied temperature _____

Minimum away temperature _____

Filter size(s) & replacement interval _____

Humidifier / boiler / radiant heat notes _____

ELECTRICAL / POWER

Main electrical panel location

Generator / backup power

Critical circuits or equipment

Known outage concerns

GAS / PROPANE

Natural gas / propane

Main shutoff location

Propane tank location / monitoring

Provider

SEPTIC / WELL / OTHER S

Septic location / service company

Well equipment / pressure tank

Water softener / treatment

Irrigation system

Hot tub / spa / other systems

FIRE & LIFE SAFETY

Smoke detector locations

CO detector locations

Fire extinguishers

Alarm / monitoring company

PREFERRED SERVICE PROVIDERS

HVAC		**Phone**	
Plumber		**Phone**	
Electrician		**Phone**	
Other provider		**Phone**	

PROPERTY-SPECIFIC VISIT NOTES

Items that should be checked every visit or require special attention:

☐ Walkthrough completed with client - Yes ☐ No

3. HOME CHECK-IN REPORT

Use for each scheduled property visit. Record exceptions and representative photos; this is a visual property check, not a professional home inspection.

Property _____ **Visit date / time** _____

PPW representative _____ **Weather / temperature** _____

ARRIVAL / EXTERIOR	OK	ISSUE	N/A
Property appears secure			
Driveway / access condition			
Visible roof / siding / window concerns			
Fallen branches / storm damage			
Exterior doors secure			

INTERIOR / SECURITY	OK	ISSUE	N/A
Entry condition normal			
Doors and windows secure			
No unusual odors			
No obvious pest activity			
No visible water intrusion			

PLUMBING / WATER	OK	ISSUE	N/A
No obvious visible leaks			
Water heater area appears normal			
Sinks / toilets visually normal			
Sump / leak sensor status if applicable			

HEATING / MECHANICAL	OK	ISSUE	N/A
Interior temperature acceptable			
Heating / HVAC appears operational			
Mechanical room visually normal			
Generator / backup status if included			

SAFETY / PROPERTY-SPECIFIC	OK	ISSUE	N/A
Smoke / CO indicators appear normal			
Packages / deliveries handled if requested			
Property-specific checklist items completed			
Included routine task completed if scheduled			

FINDINGS / ACTION REQUIRED

☐ No action required ☐ C ended ☐ Urgent issue

Notes:

☐ Photos provided - Yes ☐ No

Number of photos _____

Visit completed by: _____ Time out: _____

4. EMERGENCY & ACCESS AUTHORIZATION

Defines how Peak Property Work may enter the property and respond when an urgent condition is discovered.

Client name _____ **Property address** _____

PROPERTY ACCESS METHOD

☐ Physical key ☐ Lockbox ☐ Smart lock ☐ Garage / other

Access device / key ID (no address) _____

Security note: Do not write door, alarm, gate or safe codes on this form. Sensitive credentials should be stored through PPW's secure access procedure.

ALARM / SECURITY

Alarm company _____ **Monitoring phone** _____

Special entry / exit procedure _____

EMERGENCY CONTACT ORDER

1. Primary client _____ **Phone** _____

2. Alternate contact _____ **Phone** _____

3. Preferred local contact _____ **Phone** _____

TEMPORARY DAMAGE-PREVENTION AUTHORIZATION

If Peak Property Work discovers an urgent condition and cannot promptly reach me, I authorize PPW to take reasonable temporary steps intended to limit further property damage. Examples may include shutting off water, adjusting heat, moving an item away from an active leak, or contacting an appropriate service provider. This does not authorize major repairs or licensed trade work by PPW.

Maximum emergency spending authorized without additional approval:

☐ $0 - contact only ☐ $250 ☐ $500 ☐ $1,000 ☐ Other: _____

PREFERRED EMERGENCY PROVIDERS

Plumber _____ **Phone** _____

HVAC _____ **Phone** _____

Electrician _____ **Phone** _____

Other _____ **Phone** _____

CLIENT ACKNOWLEDGMENT

I authorize Peak Property Work and its authorized personnel to access the property for agreed services using the access method established with me. I understand that home check-ins are visual property-care visits and are not professional home inspections, security monitoring, or a guarantee that every issue will be discovered. Emergency actions are limited to the authorization above and are subject to availability and circumstances.

Client signature: _____

PPW representative: _____

