

# New Client Onboarding Packet

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Complete one packet per property. The more detail you capture up front, the fewer surprises in the field — and the more professional your service looks from day one.

## 1. Client & Property

Client name(s):	_____	Primary phone:	_____
Email:	_____	Secondary phone:	_____
Property address:	_____	Gate code:	_____
Mailing address (away):	_____	Dates away:	_____

## 2. Home Systems

### Water

Main shutoff location:	_____	Water heater location:	_____
Irrigation controller:	_____	Pool equipment:	_____

### Electrical & HVAC

Breaker panel location:	_____	Thermostat setting away:	_____
HVAC service company:	_____	Humidistat setting:	_____

### Security

Alarm company / phone:	_____	Alarm code word:	_____
Cameras on property:	_____	Wi-Fi network / password:	_____

## 3. Emergency Contacts & Vendors

Role	Name / Company	Phone	Notes
Local emergency contact			
Plumber			
Electrician			
A/C - HVAC			
Pool service			
Landscaper			
Pest control			
Handyman			
Insurance agent			

#### 4. Service Preferences & Authorizations

<input type="checkbox"/>	OK to coordinate vendors on my behalf (with approval each time)
<input type="checkbox"/>	OK to spend up to \$_____ in an emergency without prior approval
<input type="checkbox"/>	Bring in mail and packages
<input type="checkbox"/>	Run faucets and flush toilets each visit
<input type="checkbox"/>	Start vehicle(s) — details: _____
<input type="checkbox"/>	Other standing instructions: _____

#### Received and confirmed:

\_\_\_\_\_  
Company — signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Client — signature

\_\_\_\_\_  
Date

**Important:** Tip: HomeWatchTools stores all of this — client profiles, property access notes, vendors, and standing instructions — securely in one place, available on your phone during every visit. See [www.HomeWatchTools.com](http://www.HomeWatchTools.com).