

COASTAL SHIELD FIELD RESOURCE

Whole-Property Inspection Field Packet

A practical, printable checklist for the home, exterior, visible systems, grounds and maintenance priorities.

USE THIS PACKET TO:

- walk the property safely and consistently
- record visible conditions, photos and priorities
- organize questions before contacting a professional

Safety, scope and how to use this sheet

This whole-property inspection worksheet helps a homeowner, property manager or maintenance-minded owner record visible conditions. It is designed to support better conversations and a more organized property history.

Do not climb onto the roof, enter unsafe areas, open electrical equipment, disturb suspected mold, or test systems beyond your training.

Use ground-level and readily accessible observations. Stop if conditions are wet, unstable, hot, energized, contaminated, occupied by wildlife, or otherwise unsafe. Call a qualified professional when access or diagnosis requires specialized training or equipment.

Scope boundaries

☐ Visible, accessible conditions only	☐ No destructive testing or concealed-defect conclusion
☐ No promise of code compliance or insurance acceptance	☐ No diagnosis of mold, asbestos, structural engineering or environmental conditions
☐ Record concerns and refer specialized questions to the proper professional	☐ Final warranty, maintenance and service terms control

Property record

Property address	
Owner / manager	
Inspection date	
Weather / recent storm	
Inspector / reviewer	

Use the packet in order, take photos that match your notes, and mark N/A when an area cannot be safely or practically accessed.

Start with the property story

Record the property type, areas included and the owner priorities before beginning. This creates context for the observations that follow.

Property address	
Owner / manager	
Inspection date	
Property type	
Year built / major remodel	
Occupied / vacant / rental	
Recent storm / event	
Access limitations	

Areas included in this walk-through

☐ Main dwelling	☐ Garage / carport
☐ Attic / accessible storage	☐ Detached structures
☐ Pool / deck / outdoor living	☐ Rental or guest unit
☐ Driveway / hardscape / drainage	☐ Landscaping / trees / fences

Owner priorities / known concerns

Site, grounds + drainage

Walk the perimeter first. Look for conditions that move water toward the structure, create access risks or accelerate deterioration.

Site + drainage

☐ Ground slopes away from the structure where practical	☐ Downspouts discharge away from the foundation
☐ No obvious erosion, washout or standing-water pattern	☐ Catch basins, drains or swales are clear enough to function
☐ Irrigation is not spraying walls, windows or roof edges	☐ Trees and roots are not affecting structures or utilities

Grounds + access

☐ Walkways are reasonably clear and stable	☐ Steps, handrails and guardrails appear secure
☐ Fences and gates operate as intended	☐ Driveway and hardscape show no urgent trip hazard
☐ Exterior lighting is present at key access points	☐ Address / unit identification is visible for service response

Condition key: OK = no visible concern today | MONITOR = document and revisit | ACTION = repair, referral or further evaluation recommended | N/A = not accessible or not applicable.

Notes / locations / photo numbers:

Roof, exterior envelope + openings

Review the exterior envelope from safe, accessible positions. Use the roof packet for a more detailed roof-specific review.

Exterior envelope

☐ Roof covering has no obvious visible damage	☐ Flashing, vents and penetrations show no obvious concern
☐ Siding / stucco / masonry has no urgent visible failure	☐ Soffit and fascia show no obvious water damage
☐ Trim, sealants and visible joints are intact	☐ No obvious storm impact or fallen-limb damage

Doors + windows

☐ Exterior doors close and latch	☐ Weatherstripping and thresholds show no obvious failure
☐ Window glass and screens are intact	☐ Visible caulking / flashing is not obviously open
☐ No obvious water staining at openings	☐ Egress / safety concern noted for referral if applicable

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Notes / locations / photo numbers:

Attic, interior moisture clues + rooms

Inspect accessible interior areas without moving personal property or opening concealed assemblies. Record clues and refer diagnosis when needed.

Attic + ceilings

☐ Accessible attic area shows no obvious active moisture	☐ Insulation appears generally dry and in place
☐ No visible roof-deck staining or daylight gaps	☐ Ceilings show no new stains, cracks or sagging
☐ Walls show no obvious moisture or settlement clue	☐ Ventilation / exhaust routing appears reasonable

Rooms + finishes

☐ Floors feel stable under normal walking	☐ Visible doors operate and latch
☐ No obvious trip, fall or loose-fixtue hazard	☐ Bathrooms show no visible active leak clue
☐ Cabinets, counters and finishes show no urgent damage	☐ Known maintenance or turnover item recorded

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Notes / locations / photo numbers:

Visible plumbing, HVAC, electrical + safety

This is an observation sheet, not a trade certification. Do not open panels or test equipment beyond your training.

Plumbing observations

☐ Visible supply lines show no active leak	☐ Visible drain / trap areas show no active leak
☐ Water heater area is dry and accessible	☐ Shutoff locations are known or labeled
☐ Fixtures operate without obvious leak or drainage concern	☐ Sump, well, septic or specialty system referred when needed

HVAC + electrical observations

☐ Filters are accessible and service date noted	☐ Condensate line / pan shows no obvious active overflow
☐ Outdoor unit is clear of debris and vegetation	☐ Visible outlets, switches and fixtures appear intact
☐ No exposed conductors or burning / overheating clue	☐ Panel, generator or specialty equipment referred to licensed trade when needed

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Notes / locations / photo numbers:

Exterior structures, amenities + property readiness

Use this page for items that often matter to homeowners, rentals, property managers and future buyers.

Structures + amenities

☐ Decks, porches and balconies show no obvious urgent concern	☐ Pool deck, enclosure and visible equipment area are orderly
☐ Outdoor kitchen, shed or detached structure recorded	☐ Railings, stairs and guards appear secure
☐ Exterior paint / coatings show no urgent failure	☐ Appliances, fixtures or amenities needing service recorded

Rental / owner readiness

☐ Access codes / keys / lockbox notes are current	☐ Turn or deferred-maintenance items are listed
☐ Smoke / CO detector locations noted for proper testing	☐ Emergency shutoffs and service contacts are known
☐ Photos document move-in / move-out condition when relevant	☐ Priority work separated from cosmetic wish-list items

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Notes / locations / photo numbers:

Whole-property findings + action plan

Summarize each concern by location, priority and next action. Refer licensed, engineered or specialized questions to the correct professional.

Item / location	Priority	Photo #	Next action / owner

Overall condition / follow-up summary

Inspector / homeowner	
Date completed	
Recommended follow-up date	