



2026 Annual HomeCheckup Snapshot

Structured Planning Overview for Your Home

Prepared by AHA HomeCheckup™
A homeowner advisory planning tool

Confidential Planning Document

Prepared for
Your Home in GA

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EXECUTIVE SUMMARY

This report provides a structured review of your home's major systems based on the information available. Its purpose is simple: to help you plan ahead with clarity and confidence.

The 12-month outlook is classified as Planning Window Open. One or more systems have entered or are approaching a later lifecycle stage. It may be worth evaluating replacement options and establishing a capital budget within the coming year.

With a long-term ownership horizon, this plan emphasizes system longevity, durable investments, and forward-looking capital planning.

A well-maintained home rarely requires urgency — only thoughtful, steady attention over time.

The Annual Snapshot provides a structured overview designed to support proactive planning throughout the year.

Home Lifecycle Phase: Monitoring Phase

Some systems are approaching mid-life. Consistent observation and upkeep help maintain long-term performance.

PROPERTY PROFILE

Attribute	Value
Property Type	Single Family
Build Era	2000–2020
Ownership Structure	Owner (no HOA)
Timeline Horizon	Long-term (7+ years)
Climate Region	Warm-weather region

Properties from the 2000–2020 era share common characteristics in foundation materials, insulation standards, and electrical infrastructure that inform maintenance priorities.

12-MONTH PRIORITY OUTLOOK

Overall Assessment

Planning Window Open

One or more home systems have entered or are approaching a later lifecycle stage. A professional assessment within the next 12 months can help evaluate timing and budget considerations for replacement planning.

PRIMARY FOCUS

- **Schedule a professional roof review**

As your roof ages, a professional inspection can help you understand its remaining life and plan for eventual replacement. Early awareness gives you time to budget and choose the right solution.

SECONDARY WATCHLIST

Keep an eye on HVAC performance

Your HVAC system is in its middle years. Watch for changes in comfort, unusual sounds, or higher energy bills — these can be early signs that a tune-up or component replacement may be helpful.

SYSTEM STATUS OVERVIEW

HVAC / Heating & Cooling

Reported Age 10–15 years

Projected Service Window 3–7 years

Lifecycle Position  65%

Annual professional inspection is worth planning for. Monitoring hvac / heating & cooling performance and efficiency trends over the next 12 months will provide useful data.

Lifecycle Stage: Late Lifecycle

This system is entering its later service years. Begin modeling future replacement timing so you can plan proactively rather than reactively.

Roof

Reported Age Over 15 years

Projected Service Window 1–3 years

Lifecycle Position  90%

Roof is entering a later lifecycle stage. A professional assessment can help evaluate current condition and inform replacement planning.

Lifecycle Stage: End-of-Window Planning Phase

This system is within its projected replacement window. Consider scheduling an inspection and incorporating potential replacement into your capital planning horizon.

Water Heater

Reported Age 5–10 years

Projected Service Window 7–12 years

Lifecycle Position  40%

Continue routine maintenance. At this stage, there are no signs of near-term concern.

Lifecycle Stage: Mid Lifecycle

This system is approaching mid-life. Consistent upkeep now supports long-term durability and helps prevent premature wear.

Recommended Reading

Multiple home systems are approaching replacement age. Here's how to plan ahead.

CAPITAL PLANNING

Home Repair Reserve Calculator

HIGH PRIORITY

joinhomeowners.org/home-repair-reserve-calculator/

CAPITAL PLANNING

How Much Should You Save for Home Repairs? Real Costs From Homeowners

joinhomeowners.org/how-much-should-you-save-for-home-repairs/

CAPITAL PLANNING

Questions to Ask Before Hiring a Contractor (Roofing, HVAC, Plumbing)

joinhomeowners.org/ask-contractor-before-hiring/

MAINTENANCE RHYTHM

Maintenance is easiest when it's attached to something you already remember — a season change, a holiday, or a personal milestone. The goal is steady attention over time, not perfection.

QUARTERLY

Replace HVAC filters quarterly

Improves efficiency and reduces long-term system strain.

Estimated time: 5-10 minutes

Calendar Anchor: Set a recurring reminder for the first weekend of each quarter.

Check under sinks and around appliances for signs of leaks quarterly

Early leak detection prevents mold growth and structural moisture damage.

Estimated time: 10 minutes

Routine Pairing: Pair this with your HVAC filter change so it becomes one routine.

SEASONAL

Schedule HVAC pre-summer service to prepare for warmer months

Highly recommended annually due to extended cooling cycles.

Estimated time: Professional service recommended

Calendar Anchor: Book this when daylight saving time changes in spring.

Clean gutters and downspouts each spring and fall

Prevents water backup that can damage roofing, fascia, and foundation.

Estimated time: 1-2 hours (or professional service)

Seasonal Reminder: Schedule at the start of leaf drop and after heavy storm seasons.

Trim trees away from roofline before peak storm season

Reduces storm impact risk.

Estimated time: 1-2 hours

Seasonal Reminder: Perform before peak storm season.

ANNUAL

Test smoke detectors twice yearly

Ensures early detection capability remains reliable year-round.

Estimated time: 5 minutes

Calendar Anchor: Test when clocks change in spring and fall.

Flush water heater annually to remove sediment buildup

Extends unit lifespan and maintains heating efficiency over time.

Estimated time: 30-45 minutes (or professional service)

Calendar Anchor: Schedule during your birthday month or tax season.

Inspect exterior caulking and window seals annually

Prevents moisture intrusion and sun-related degradation.

Estimated time: 30 minutes

Seasonal Reminder: Perform during spring cleaning season.

Inspect roof attachment points and visible shingle integrity annually

Reduces vulnerability during high-wind events.

Estimated time: Professional inspection recommended

Seasonal Reminder: Schedule before the start of hurricane season.

At this stage, maintenance consistency becomes especially valuable in extending usable service life.

CAPITAL PLANNING OUTLOOK

While no immediate replacement is required, one or more systems are entering later service years. Forward-looking capital planning is recommended to maintain financial flexibility.

System	Window	Planning Note
HVAC System	3–7 years	Monitor efficiency trends. Worth planning for within the medium term.
Roof	1–5 years	Worth planning for within the next 12 months. Evaluate material and condition.

Planning ahead — even when no immediate expenses are expected — provides flexibility and peace of mind.

Plan Outlook

This plan reflects your most recent inputs and remains aligned with your current ownership horizon.

This document is prepared for planning purposes and is based on information available at the time of assessment. AHA is a national membership that guides and protects homeowners. For the most current guidance, schedule an annual reassessment or contact AHA member services.

Take It Further with AHA HomeOS

AHA is the national membership that guides and protects homeowners.

With AHA HomeOS, your home's information is organized and kept up to date — helping you reduce the cost and hassle of homeownership and make better decisions over time.

Your AHA membership includes a HomeOS profile — a living record of your home that builds on this report and keeps everything organized, current, and working for you.

What You Get

- A HomeIQ score that reflects the strength and completeness of your home data
- Smart alerts when something needs attention or may be costing you money
- Clear next steps to reduce risk, avoid costly surprises, and save where possible
- A secure place for your home records, documents, and key details

Your HomeIQ updates as your home information is refined, and AHA surfaces helpful insights as things change.

How It Works

- 1 Scan the QR code below
- 2 Confirm your home details
- 3 Activate your AHA HomeOS profile

Your report is already connected. AHA builds from here.

AHA is built to guide and protect homeowners through trusted insights, savings, and ongoing guidance.

Your AHA HomeOS Profile Is Ready

This report has already created the foundation of your HomeOS profile.

AHA has organized key details about your home and will continue helping you keep everything current — so you can stay ahead of maintenance, costs, and important decisions.

ALREADY ORGANIZED (FROM YOUR REPORT)

Roof: Over 15 years

HVAC: 10–15 years

Water Heater: 5–10 years



Scan to continue your HomeOS profile

Continue Your AHA HomeOS Profile

Open your camera and scan the code to continue.