HOMEOWNER MASTERY
WORKBOOK SERIES

YOUR ROOF WORKBOOK

Track. Protect. Make Better Decisions.

Your roof. Your records. Your peace of mind.



RECORD
Create a complete roof history

MAINTAIN
Track maintenance and inspections

PROTECT
Keep warranties and important documents

PLAN AHEAD
Budget, evaluate, and make informed decisions

BUILT FOR HOMEOWNERS
Simple tools to help you manage your roof with confidence.

HOMEOWNER MASTERY LIBRARY

Knowledge → Understanding → Better Decisions

OUR APPROACH

Homeowner Mastery is here to help you understand your home—not to tell you what to buy or what to believe.

We don't steer homeowners toward replacing something, buying something, choosing a particular technology, or adopting a particular point of view.

We explain what something is, how it works, what the considerations are, and what questions are worth asking. **Better decisions can also mean keeping more of your money.**

THEN YOU DECIDE.

KNOWLEDGE
You learn the basics.

UNDERSTANDING
You understand how your home works.

BETTER DECISIONS
You make thoughtful, informed choices.

SAVE MONEY
Better decisions can save you money.

OUR MISSION: *Helping people make better homeownership decisions through every stage of the homeowner journey.*

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Scan to visit the Homeowner Mastery Library

HM HOMEOWNER MASTERY

KNOWLEDGE → UNDERSTANDING → BETTER DECISIONS → SAVE MONEY

How to use this workbook

This workbook becomes the permanent record of your roof throughout your ownership. Use it to document information, track maintenance, record repairs, and keep important documents in one place.

GET THE MOST FROM THIS WORKBOOK

1. **GATHER**
   Collect any existing information, documents, photos, and records about your roof.
2. **DOCUMENT**
   Complete each section as accurately as possible. Use photos whenever you can.
3. **KEEP IT CURRENT**
   Update your record regularly, especially after storms, inspections, or repairs.
4. **STAY ORGANIZED**
   Store all related documents together in your Homeowner Mastery Library.
5. **PROTECT YOUR INVESTMENT**
   A complete roof history helps you make better decisions and protects your home investment.

WHAT TO INCLUDE

- **DOCUMENTS:** Warranties, inspection reports, invoices, insurance claims, permits, product information.
- **PHOTOS:** Overall roof views, details, damage, and repairs. Date each photo.
- **MAINTENANCE:** Routine tasks, dates, and service provider information.
- **REPAIRS & IMPROVEMENTS:** What was done, when, by whom, and cost.
- **NOTES:** Observations, recommendations, and important reminders.

A well-documented roof is easier to maintain, insure, sell, and manage.

WHERE TO STORE YOUR DOCUMENTS

Keep digital copies of all records, photos, and related documents in your Homeowner Mastery Library.

Upload and Save
Store PDFs, photos, and files securely in your library.

Organize by Category
Use the suggested folders to keep everything easy to find.

Access Anytime, Anywhere
Your records are available whenever you need them.

Share When Needed
Easily share documents with contractors, inspectors, or your insurance company.

TIPS FOR SUCCESS

- **TAKE GOOD PHOTOS** Clear, well-lit photos provide valuable evidence over time.
- **SET REMINDERS** Schedule seasonal inspections and maintenance.
- **SAVE EVERYTHING** When in doubt, save it. You'll be glad you did.
- **CONSISTENCY PAYS OFF** A few minutes today can prevent costly problems tomorrow.

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WORKBOOK TIP

Use the Table of Contents to quickly find the pages you need as you work through your Roof Workbook.

Roof Profile



Your roof's permanent information at a glance.

Complete this page to establish your baseline record. Keep this information current and accurate. This becomes the foundation for all future entries in your Roof Workbook.

1 PROPERTY AND ROOF DETAILS

PROPERTY ADDRESS		DATE INSTALLED	
CITY / STATE / ZIP		ORIGINAL INSTALLATION YEAR	
HOME TYPE	☐ Single Family ☐ Townhome ☐ Other	ESTIMATED ROOF AGE (Years)	
NUMBER OF STORIES		# OF ROOF PLANES	
ROOF TYPE	(e.g., Asphalt Shingle, Metal, Tile, Flat)	ATTIC TYPE	☐ Ventilated ☐ Unventilated
ROOF STYLE	(e.g., Gable, Hip, Flat)	VENTILATION TYPE	(e.g., Ridge Vent, Soffit, Gable, Power Vent)
COLOR / STYLE		PRIMARY SLOPE DIRECTION	(e.g., North, South, East, West)
SQUARE FOOTAGE (APPROX.)		ROOF PITCH (APPROX.)	

2 INSTALLATION AND WARRANTY INFORMATION

INSTALLING CONTRACTOR		MANUFACTURER	
COMPANY PHONE		PRODUCT / MATERIAL	
COMPANY EMAIL / WEBSITE		WARRANTY TYPE	☐ Material ☐ Workmanship ☐ Extended
INSTALLATION NOTES		WARRANTY EXPIRATION DATE(S)	
		WARRANTY DOCUMENT LOCATION	(e.g., File Cabinet, Binder, Digital Folder)

3 BASELINE CONDITION AND NOTES

DATE OF BASELINE INSPECTION

OVERALL CONDITION (TODAY) ☐ Excellent ☐ Good ☐ Fair ☐ Poor

NOTES / OBSERVATIONS

ROOF DIAGRAM – ORIENTATION (MARK FRONT)



PHOTO LOCATION

Use this space to note where photos are stored.

(e.g., Digital Folder, Photo Album, Drive)

HOMEOWNER INSIGHT | This is your baseline. Everything you record in this workbook will be measured against the condition documented here today.

Roof check & observation record

Observe from the ground or another safe location.
This record is not an invitation to climb onto your roof.

CHECK DETAILS

Date: _____

Reason for check:

- ☐ Routine observation
- ☐ After significant weather event
- ☐ Seasonal transition
- ☐ Noticed a specific issue
- ☐ Other: _____

SEASONAL CHECK

- ☐ Winter → Spring
- ☐ Spring → Summer
- ☐ Summer → Fall
- ☐ Fall → Winter

WHO PERFORMED THE CHECK?

- ☐ Homeowner
- ☐ Professional (name/company)
- ☐ Other: _____

EXTERIOR OBSERVATIONS

Visible from the ground or other safe location.

- ☐ Missing, cracked, or damaged shingles
- ☐ Debris on roof (leaves, branches, etc.)
- ☐ Sagging or uneven areas
- ☐ Flashing around roof penetrations (chimney, vents, skylights)
- ☐ Gutters and downspouts (condition and flow)
- ☐ Trees or branches contacting roof
- ☐ Other: _____

INTERIOR OBSERVATIONS

Check inside only if safely accessible.

- ☐ Signs of water stains on ceilings or walls
- ☐ Moisture in attic (if accessible)
- ☐ Daylight visible through roof boards (if accessible)
- ☐ Musty odors
- ☐ No visible issues
- ☐ Other: _____

PHOTOS TAKEN

☐ Yes ☐ No

Photos stored:

☐ Phone ☐ Computer ☐ Cloud Storage

☐ Other: _____

CHANGES SINCE LAST CHECK

- ☐ No significant changes
- ☐ Yes (describe below)

_____

_____

_____

ITEMS TO MONITOR

_____

_____

_____

_____

_____

FOLLOW-UP ACTION

☐ Monitor ☐ Repair needed

☐ Contact a professional ☐ No action at this time

Notes: _____

_____

_____

NEXT CHECK

Recommended date for next observation: _____

ADDITIONAL NOTES

_____

_____

Roof History Log

Every inspection, maintenance task, repair, or improvement you record here adds value. Over time, your roof history becomes proof of responsible ownership and helps you make informed decisions.

WHY IT MATTERS

A complete roof history can help maintain warranties, support insurance claims, increase home value, and save you money by catching small issues early.

EXAMPLE ENTRY (REFERENCE ONLY)

DATE	TYPE OF ENTRY	DESCRIPTION / DETAILS	PERFORMED BY	COST (Approximate OK)	NOTES / DOCUMENTS (Receipts, Photos, File Name)
04/15/2025	*Inspection*	*Spring inspection completed. All shingles intact. Cleaned gutters. No issues found.*	*Homeowner*	*$0*	*Photos saved in Library (04-15-2025 Inspection.pdf)*

YOUR ROOF HISTORY LOG

DATE	TYPE OF ENTRY (Inspection, Maintenance, Repair, Improvement, Other)	DESCRIPTION / DETAILS What was done or observed? Include materials, issue found, weather event, or work completed.	PERFORMED BY (Who did the work?)	COST (Approximate OK)	NOTES / DOCUMENTS (Receipts, Photos, File Name)

NEED MORE SPACE?

Download additional Roof History Log pages anytime from the Homeowner Mastery Library.

PRO TIP

Record small actions today that prevent big expenses tomorrow.

COMMON TYPES OF ENTRIES

INSPECTION
Routine inspections, seasonal checks, or after severe weather.

MAINTENANCE
Cleaning gutters, clearing debris, sealing, minor adjustments.

REPAIRS
Leak repairs, shingle replacement, flashing repairs, etc.

IMPROVEMENTS
Upgrades, ventilation improvements, insulation added, etc.

OTHER
Insurance claims, contractor evaluations, warranty updates, etc.

Roof History Log

DATE	TYPE OF ENTRY (Inspection, Maintenance, Repair, Improvement, Other)	DESCRIPTION / DETAILS What was done or observed? Include materials used, issues found, weather events, etc.	PERFORMED BY (Contractor / Owner / Inspector)	COST / ESTIMATE (Estimate OK)	NOTES / DOCUMENTS (Photos • Receipts • Warranties • File Name)

A consistent record today protects your home tomorrow.
Keep accurate. Keep it current. Keep it simple.

Maintenance Log

KEEPING YOUR ROOF IN TOP CONDITION

Regular maintenance is the key to a longer-lasting roof. Use this section to record all maintenance tasks, cleanings, adjustments, and service visits that help protect your roof and your home.

WHY IT MATTERS

Consistent maintenance helps prevent small issues from becoming expensive repairs. Good records also support warranty requirements and can increase your home's value.

EXAMPLE ENTRY (FOR REFERENCE)

DATE	WORK PERFORMED (What was done?)	REASON (Check one)	PERFORMED BY (Homeowner / Contractor)	COST (Approx.)	NEXT RECOMMENDED SERVICE (Date)	NOTES / DOCUMENTS (Receipts, Photos, File Name)
04/15/2025	Cleaned gutters and downspouts. Removed leaves and debris. Checked for proper flow and secure attachments.	☑ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related	*Homeowner*	*$0*	*10/15/2025 (Fall Cleaning)*	*Photos saved in Library (04-15-2025 Maintenance.pdf)*

HOW TO USE THIS LOG

1. Record every maintenance task, no matter how small.
2. Include the reason for the maintenance.
3. Note who performed the work and how much it cost.
4. Track the next recommended service to stay ahead.
5. Attach or store receipts, photos, and related documents in your Library.

PRO TIP

A little maintenance today prevents major expenses tomorrow. Keep records as you go.

YOUR MAINTENANCE LOG

DATE	WORK PERFORMED (What was done?)	REASON (Check one)	PERFORMED BY (Homeowner / Contractor)	COST (Approx.)	NEXT RECOMMENDED SERVICE (Date)	NOTES / DOCUMENTS (Receipts, Photos, File Name)
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				

NEED MORE SPACE?

Additional Maintenance Log pages are available as downloadable templates in the *Homeowner Mastery Library.*

GOOD RECORDS. BETTER DECISIONS.

Well-maintained roofs last longer, perform better, and protect your home and investment.

Maintenance Log

YOUR ENTRIES

DATE	MAINTENANCE PERFORMED (What was done?)	REASON (Check one)	PERFORMED BY (Who did the work?)	COST (Approx. OK)	NEXT RECOMMENDED SERVICE (Date)	NOTES / DOCUMENTS (Receipts • Photos • File)
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				

A consistent record today protects your home tomorrow.
Keep it accurate. Keep it current. Keep it organized.

Repair Log

KEEPING TRACK OF ROOF REPAIRS

Use this section to document every repair, no matter how small. A clear record of what was repaired, when, and by whom helps you evaluate your roof's condition, plan future maintenance, and support warranty or insurance claims.

WHY IT MATTERS

Small repairs today can prevent major damage tomorrow. Good records help you spot patterns, protect warranties, and make confident decisions about your roof.

EXAMPLE ENTRY (FOR REFERENCE)

DATE	AREA / LOCATION (Where on the roof?)	DESCRIPTION OF REPAIR (What was repaired?)	CAUSE (What caused it?)	PERFORMED BY (Who did the work?)	COST (Amount Paid)	WARRANTY? (Y / N)	NOTES / DOCUMENTS (Receipts, Photos, File Name)
05/12/2025	*Front roof slope (above garage)*	*Replaced 3 damaged shingles and sealed nail heads.*	*Wind damage from storm*	*ABC Roofing & Exteriors*	*$275*	*Y (Shingle Warranty)*	*Receipt and photos saved in Library (05-12-2025 Repair.pdf)*

HOW TO USE THIS LOG

- Record every repair, no matter how minor.
- Note the exact location and what was repaired.
- Include what caused the damage if known.
- List who performed the work and how much it cost.
- Save receipts, photos, and related documents in your Library.

PRO TIP

Documenting small repairs today can help you avoid bigger problems — and bigger costs — later. A good repair record is also valuable when selling your home.

YOUR REPAIR LOG

DATE	AREA / LOCATION (Where on the roof?)	DESCRIPTION OF REPAIR (What was repaired?)	CAUSE (What caused it?)	PERFORMED BY (Who did the work?)	COST (Amount Paid)	WARRANTY? (Y / N)	NOTES / DOCUMENTS (Receipts, Photos, File Name)

NEED MORE SPACE?

Download extra Repair Log sheets from the *Homeowner Mastery Library*.

GOOD RECORDS. SMARTER DECISIONS.

Well-documented repairs help protect your warranties, extend roof life, and preserve your home's value.

Repair Log

YOUR ENTRIES

DATE	AREA / LOCATION (Where on the roof?)	DESCRIPTION OF REPAIR (What was repaired?)	CAUSE (What caused it?)	PERFORMED BY (Who did the work?)	COST (Estimate OK)	WARRANTY APPLIES? (Y / N)	NOTES / DOCUMENTS (Receipts, Photos, File Name)

KEEP A COMPLETE RECORD

Every repair you track today helps you protect your roof, support your warranties, and make smarter decisions tomorrow.

Planning Ahead

ORGANIZE TODAY. PREPARE FOR TOMORROW.

Planning ahead protects both your roof and your budget. Accurate warranty, insurance, and replacement records help you make informed decisions, avoid unnecessary costs, and be ready when major repairs or replacement become necessary.

This section includes three important components:

WARRANTY RECORDS
Track material and workmanship warranties so you know what's covered and until when.

INSURANCE RECORDS
Keep policy and claim information organized and easy to access.

REPLACEMENT PLANNING
Estimate future replacement costs and build a savings plan so you're ready when the time comes.

WHY IT MATTERS
- Protects your ability to file a claim or use your warranty.
- Saves time and stress when you need information quickly.
- Helps you avoid unexpected costs.
- Givee you confidence in every decision you make.

HOW TO USE THIS SECTION
- Record all warranty details when you receive them.
- Update insurance information at least once a year.
- Review replacement planning annually and adjust your savings goal.
- Store copies of warranty documents, policies, and claims in your Homeowner Mastery Library.
- Use this information when talking with contractors, insurers, or real estate professionals.

PRO TIP
A few minutes of records today can save you thousands of dollars and significant frustration tomorrow.

EXAMPLE CURRENT WARRANTY ENTRIES

WARRANTY TYPE (Material / Workmanship)	PROVIDER / COMPANY	COVERAGE DETAILS (What's Covered)	START DATE (mm/dd/yyyy)	EXPIRATION DATE (mm/dd/yyyy)	TRANSFERABLE? (Y / N)	DOCUMENT LOCATION (Library Folder / Notes)
Material	*GAF (Timberline HDZ)*	*Shingles, underlayment, accessories*	*06/15/2024*	*06/15/2044 (20 yrs)*	*Y*	*Library / Warranties / GAF*
Workmanship	*ABC Roofing*	*Installation labor*	*06/15/2024*	*06/15/2029 (5 yrs)*	*Y*	*Library / Warranties / ABC Roofing*

CURRENT WARRANTY RECORDS (Update this page when warranties change or your roof is replaced.)

WARRANTY TYPE (Material / Workmanship)	PROVIDER / COMPANY	COVERAGE DETAILS (What's Covered)	START DATE (mm/dd/yyyy)	EXPIRATION DATE (mm/dd/yyyy)	TRANSFERABLE? (Y / N)	DOCUMENT LOCATION (Library Folder / Notes)

IMPORTANT REMINDER
Keep all original warranty documents. Many warranties require proof of purchase and proper documentation to remain valid.

KEEP THIS PAGE CURRENT
If your roof is replaced, update this page with the new warranty information and retain previous warranty documents as part of your roof history.

Insurance Records

Your homeowners insurance is your financial protection when the unexpected happens. Accurate information and good records help you file claims correctly and get the coverage you're entitled to.

WHY IT MATTERS

- Helps you file claims quickly and correctly.
- Ensures you understand what is covered and what is not.
- Helps you avoid surprises with deductibles and limitations.
- Protects your investment and financial stability.

MY ROOF INSURANCE SUMMARY

Keep this information up to date.

INSURANCE COMPANY: _____

POLICY NUMBER: _____

PROPERTY ADDRESS: _____

_____

_____

AGENT / CONTACT NAME: _____

AGENT PHONE: _____

AGENT EMAIL: _____

24-HOUR CLAIMS PHONE: _____

POLICY EFFECTIVE DATE: ___/___/___

POLICY RENEWAL DATE: ___/___/___

MORTGAGE COMPANY (if applicable): _____

MORTGAGE ACCOUNT #: _____

POLICY DOCUMENTS STORED: _____
(Physical location or digital folder)

DEDUCTIBLE INFORMATION (Roof Related)

ALL PERILS DEDUCTIBLE: $ _____

WIND / HAIL DEDUCTIBLE: $ _____ or _____ %

OTHER DEDUCTIBLES THAT APPLY: _____

ROOF CLAIMS SUBJECT TO:

☐ Flat deductible ☐ Wind/Hail percentage deductible

COVERAGE & POLICY DETAILS

Replacement Cost Coverage (RCV)?	☐ Yes	☐ No
Actual Cash Value Coverage (ACV)?	☐ Yes	☐ No
Roof Depreciation Applies?	☐ Yes	☐ No

Special Roof Endorsements / Riders: _____

TYPICAL ROOF INSURANCE CONSIDERATIONS

OFTEN COVERED*

(Depends on your policy)

- Wind damage
- Hail damage
- Fire and lightning
- Falling trees or branches
- Sudden accidental damage

COMMON EXCLUSIONS*

(Review your specific policy)

- Normal wear and aging
- Lack of maintenance
- Installation defects *(may fall under workmanship warranty)*
- Gradual leaks
- Mold or fungus
- Neglected damage

BEFORE YOU FILE A CLAIM

- ☑ Review your deductible and coverage limits.
- ☑ Document the damage with clear photos from several angles.
- ☑ Prevent additional damage if it is safe to do so.
- ☑ Contact your insurance company before authorizing major repairs (except emergency mitigation).
- ☑ Keep all inspection reports, receipts, and invoices.

** Your individual policy determines what is covered or excluded. Always review your actual policy or ask your agent.*

POLICY NOTES

Important details, limits, endorsements, or anything else you want to remember about your roof coverage.

_____

_____

_____

_____

_____

_____

_____

AFTER STORM DAMAGE – QUICK CHECKLIST

1. ☐ Ensure everyone's safety first.
2. ☐ Photograph all damage to your roof and property.
3. ☐ Prevent additional damage if safe to do so (temporary tarp, etc.).
4. ☐ Contact your insurance company.
5. ☐ Record your claim number and adjuster's name: _____
6. ☐ Save all receipts and invoices for repairs or temporary work.
7. ☐ Update your Roof Workbook with claim details.

Insurance notes & claim information

KEEP IMPORTANT INSURANCE INFORMATION IN ONE PLACE.

Insurance policies can be complex and change over time. Use this page to record important details, conversations, and other information that may help you when you need to file a claim or review your coverage.

> ***Record conversations while they're fresh.***
> ***Small details are often forgotten later.***

WHY THIS MATTERS

Accurate notes and records can help you:

- Understand your coverage and limitations
- Avoid surprises when filing a claim
- Support your claim with clear documentation
- Save time, stress, and out-of-pocket costs

COMMON POLICY UPDATES (Examples)

- ☐ Deductible changed
- ☐ Coverage updated
- ☐ Endorsement added
- ☐ Agent changed

POLICY NOTES

Use this space to record important policy details, endorsements, limitations, or anything you want to remember.

Examples: *special roof endorsements, deductible changes, coverage limits, exclusions, ACV vs. RCV details, inspection requirements, solar panel coverage, etc.*

AGENT CONVERSATIONS LOG

Document important conversations with your agent or insurance company.

DATE (mm/dd/yyyy)	PERSON (Name & Title)	TOPIC	OUTCOME / FOLLOW-UP (What was decided?)

Pro Tip: *A quick note today can prevent confusion tomorrow.*

CLAIMS & REFERENCE NUMBERS

Keep a record of all roof-related claims and key reference numbers.

DATE OF LOSS (mm/dd/yyyy)	CLAIM NUMBER	ADJUSTER / CONTACT	STATUS (Open / Closed)	NOTES / DOCUMENT LOCATION

Store copies of all claim-related documents in your Homeowner Mastery Library.

ADDITIONAL NOTES & IMPORTANT INFORMATION

Use this space for anything else you want to capture.

KEEP THIS INFORMATION UP TO DATE

Review and update this page at least once a year and whenever your policy changes. Store copies of your policy, endorsements, and declarations in your Homeowner Mastery Library.

Good records support better insurance decisions and faster claims.

Planning for future roof replacement

Plan Today. Replace with Confidence.

WHERE AM I TODAY?

Understanding your roof's current age, condition, and expected remaining life helps you plan ahead so a future replacement doesn't become a financial surprise.

HOMEOWNER MASTERY INSIGHT

Roof replacement is a significant expense that most homeowners will eventually face. Understanding the potential cost ahead of time provides perspective and allows future decisions to be made with better information.

1 YOUR ROOF TODAY

Year Roof Installed (or age if known):	_____
Current Roof Age:	_____ years
Expected Service Life (for this roof type):	_____ years
Estimated Remaining Life:	_____ years
Current Condition (Choose one):	☐ Excellent ☐ Good ☐ Fair ☐ Poor

Note: Remaining life is an estimate based on current condition and normal circumstances.

2 REPLACEMENT PLANNING

Target Replacement Year (Estimated):	_____
Estimated Replacement Cost (Today's Dollars):	$ _____
Inflation Adjustment (Estimated % per year):	_____ % (Choose a rate 2–5% typical)
Estimated Future Replacement Cost (In Target Year):	$ _____

These are planning estimates only. Actual costs can vary based on material, roof size, location, and market conditions.

3 REPLACEMENT PLANNING NOTES

QUESTIONS I WANT ANSWERED BEFORE REPLACEMENT

_____

_____

_____

THINGS THAT MAY INFLUENCE MY DECISION

_____

_____

_____

IDEAS OR REMINDERS FOR THE FUTURE

_____

_____

_____

4 REPLACEMENT PLANNING REMINDERS

- ☐ Review estimated costs every 1–2 years.
- ☐ Update this worksheet after major repairs or material upgrades.
- ☐ Recalculate estimates if replacement timing or costs are expected to change.
- ☐ Keep this worksheet with your permanent roof records for future reference.
- ☐ Compare future estimates with actual quotes when replacement becomes necessary.

ADDITIONAL NOTES

Use this space for any notes about costs, contractors, financing options, or other considerations related to future roof replacement.

_____

_____

_____

Planning ahead

Every roof eventually reaches the end of its service life.

You don't need to make any decisions today. Simply recognizing that every roof is eventually replaced gives you more time to prepare if and when that day comes.

YOUR ROOF TODAY

Estimated Roof Age: _____

Estimated Remaining Life: _____

Estimated Replacement Timeframe: _____

(Example: Within 5 years, 5–10 years, 10+ years.)

LOOKING AHEAD

If replacement becomes necessary someday, which options might you consider?

- ☐ Insurance claim (if covered)
- ☐ Personal savings
- ☐ Home equity
- ☐ Financing
- ☐ Other: _____

QUESTIONS FOR THE FUTURE

_____

_____

_____

_____



HOMEOWNER MASTERY INSIGHT

Homeowner Mastery doesn't tell you what to do.
It helps you understand what's ahead so you can ask better questions, do your own research, and make informed decisions before an unexpected expense catches you by surprise.

WORKBOOK TIP

You don't need all the answers today, The goal is simply to understand what's ahead so you can make decisions with confidence when the time is right.

Appendix

Additional worksheets and notes

KEEP YOUR RECORDS COMPLETE

Your roof records will continue to grow over time. The following pages provide additional worksheets for continuing your records, along with space for your own notes and observations.

Use them as needed to keep important information together and your Roof Workbook up to date.



WORKBOOK TIP

Add dates whenever possible. A simple, chronological record can be extremely useful years from now.

Roof check & observation record

Observe from the ground or another safe location.
This record is not an invitation to climb onto your roof.

CHECK DETAILS

Date: _____

Reason for check:

- ☐ Routine observation
- ☐ After significant weather event
- ☐ Seasonal transition
- ☐ Noticed a specific issue
- ☐ Other: _____

SEASONAL CHECK

- ☐ Winter → Spring
- ☐ Spring → Summer
- ☐ Summer → Fall
- ☐ Fall → Winter

WHO PERFORMED THE CHECK?

- ☐ Homeowner
- ☐ Professional (name/company)
- ☐ Other: _____

EXTERIOR OBSERVATIONS

Visible from the ground or other safe location.

- ☐ Missing, cracked, or damaged shingles
- ☐ Debris on roof (leaves, branches, etc.)
- ☐ Sagging or uneven areas
- ☐ Flashing around roof penetrations (chimney, vents, skylights)
- ☐ Gutters and downspouts (condition and flow)
- ☐ Trees or branches contacting roof
- ☐ Other: _____

INTERIOR OBSERVATIONS

Check inside only if safely accessible.

- ☐ Signs of water stains on ceilings or walls
- ☐ Moisture in attic (if accessible)
- ☐ Daylight visible through roof boards (if accessible)
- ☐ Musty odors
- ☐ No visible issues
- ☐ Other: _____

PHOTOS TAKEN

☐ Yes ☐ No

Photos stored:

☐ Phone ☐ Computer ☐ Cloud Storage

☐ Other: _____

CHANGES SINCE LAST CHECK

- ☐ No significant changes
- ☐ Yes (describe below)

_____

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_____

ITEMS TO MONITOR

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FOLLOW-UP ACTION

☐ Monitor ☐ Repair needed

☐ Contact a professional ☐ No action at this time

Notes: _____

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NEXT CHECK

Recommended date for next observation: _____

ADDITIONAL NOTES

_____

_____

Roof check & observation record

Observe from the ground or another safe location.
This record is not an invitation to climb onto your roof.

CHECK DETAILS

Date: _____

Reason for check:

- ☐ Routine observation
- ☐ After significant weather event
- ☐ Seasonal transition
- ☐ Noticed a specific issue
- ☐ Other: _____

SEASONAL CHECK

- ☐ Winter → Spring
- ☐ Spring → Summer
- ☐ Summer → Fall
- ☐ Fall → Winter

WHO PERFORMED THE CHECK?

- ☐ Homeowner
- ☐ Professional (name/company)
- ☐ Other: _____

EXTERIOR OBSERVATIONS

Visible from the ground or other safe location.

- ☐ Missing, cracked, or damaged shingles
- ☐ Debris on roof (leaves, branches, etc.)
- ☐ Sagging or uneven areas
- ☐ Flashing around roof penetrations (chimney, vents, skylights)
- ☐ Gutters and downspouts (condition and flow)
- ☐ Trees or branches contacting roof
- ☐ Other: _____

INTERIOR OBSERVATIONS

Check inside only if safely accessible.

- ☐ Signs of water stains on ceilings or walls
- ☐ Moisture in attic (if accessible)
- ☐ Daylight visible through roof boards (if accessible)
- ☐ Musty odors
- ☐ No visible issues
- ☐ Other: _____

PHOTOS TAKEN

☐ Yes ☐ No

Photos stored:

☐ Phone ☐ Computer ☐ Cloud Storage

☐ Other: _____

CHANGES SINCE LAST CHECK

- ☐ No significant changes
- ☐ Yes (describe below)

_____

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_____

ITEMS TO MONITOR

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FOLLOW-UP ACTION

☐ Monitor ☐ Repair needed

☐ Contact a professional ☐ No action at this time

Notes: _____

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Recommended date for next observation: _____

ADDITIONAL NOTES

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ITEMS TO MONITOR

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Notes: _____

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ADDITIONAL NOTES

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Notes: _____

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NEXT CHECK

Recommended date for next observation: _____

ADDITIONAL NOTES

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Roof History Log

DATE	TYPE OF ENTRY (Inspection, Maintenance, Repair, Improvement, Other)	DESCRIPTION / DETAILS What was done or observed? Include materials used, issues found, weather events, etc.	PERFORMED BY (Contractor / Owner / Inspector)	COST / ESTIMATE (Estimate OK)	NOTES / DOCUMENTS (Photos • Receipts • Warranties • File Name)

A consistent record today protects your home tomorrow.
Keep accurate. Keep it current. Keep it simple.

Maintenance Log

YOUR ENTRIES

DATE	MAINTENANCE PERFORMED (What was done?)	REASON (Check one)	PERFORMED BY (Who did the work?)	COST (Approx. OK)	NEXT RECOMMENDED SERVICE (Date)	NOTES / DOCUMENTS (Receipts • Photos • File)
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				
		☐ Routine ☐ Seasonal ☐ Preventive ☐ Storm-Related				

A consistent record today protects your home tomorrow.
Keep it accurate. Keep it current. Keep it organized.

Repair Log

YOUR ENTRIES

DATE	AREA / LOCATION (Where on the roof?)	DESCRIPTION OF REPAIR (What was repaired?)	CAUSE (What caused it?)	PERFORMED BY (Who did the work?)	COST (Estimate OK)	WARRANTY APPLIES? (Y / N)	NOTES / DOCUMENTS (Receipts, Photos, File Name)

KEEP A COMPLETE RECORD

Every repair you track today helps you protect your roof, support your warranties, and make smarter decisions tomorrow.

HOMEOWNER MASTERY INSIGHT

Small observations today can prevent big problems tomorrow.

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