

FIRST YEAR IN YOUR HOUSE CHECKLIST



Moving into a new home is exciting—but it can also be overwhelming. From utility setup to community connection, there's a lot to keep track of in your first year.

To help you stay organized, we've created a simple, printable **"First Year in Your House" Checklist**. Use it as a go-to guide as you settle in!

Month 1–2: Settling In

- ☐ Change your address (USPS, bank, subscriptions)
- ☐ Set up or transfer utilities (gas, electric, water, trash, internet)
- ☐ Update your driver's license and vehicle registration
- ☐ Find your local grocery store, pharmacy, clinic, and vet
- ☐ Introduce yourself to your neighbors
- ☐ Test smoke alarms and carbon monoxide detectors
- ☐ Review your mortgage and set up automatic payments*
- ☐ Secure important documents in a fireproof box

Month 3–6: Organizing & Optimizing

- ☐ Create a seasonal home maintenance calendar
- ☐ Review your homeowner's insurance policy****
- ☐ Start an emergency fund for unexpected repairs
- ☐ Meet with your banker to review your financial plan
- ☐ Track your monthly budget
- ☐ Identify any needed repairs or upgrades
- ☐ Declutter one room at a time
- ☐ Check for property tax due dates

Month 7–12: Planning Ahead

- ☐ Apply for homestead credit if eligible
- ☐ Explore HELOC or savings options for future projects*
- ☐ Schedule annual HVAC, plumbing, and appliance checkups
- ☐ Research local contractors or handymen
- ☐ Revisit your budget and long-term savings goals
- ☐ Start a savings plan for big-ticket home items
- ☐ Connect with your community (events, clubs, service opportunities)
- ☐ Reflect on what's working well and what you'd like to improve

FEATURED SERVICES

- Pro Rewards Checking with no monthly fees**
- Savings + Certificates of Deposit
- HELOC Services + Mortgage Support*
- Health Savings Accounts*****
- Budgeting + Cash Flow App Access
- In-app support + real human help***
- Insurance + Investment Services****

NEED LOCAL FINANCIAL SUPPORT?

At Profinium, we offer everything from digital banking to personalized mortgage advice—plus a local team who truly wants to help you thrive.

Explore our services or connect with us today at Profinium.com.

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***First debit card is free. \$10.00 per replacement card. Third party fees for internet, QR codes, messaging, or data plans may apply.*

****Available during our standard business hours. Visit www.profinium.com/locations-and-hours*

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