



Estate Management & Seasonal Home Oversight

TABLE OF CONTENTS

I	Estate Management Overview	3
II	Estate Management Services	4
III	Customized Service Structures	5
IV	How Palm Crest Works	6
V	Reporting & Follow-Through	7
VI	Our Standards of Care	8
VII	Sample Estate Visit Report	9
VIII	Security, Access & Privacy	10
IX	Getting Started	11
X	Contact & Next Steps	12

ESTATE MANAGEMENT OVERVIEW

Palm Crest Estate Services provides professional estate management for seasonal and absentee homeowners throughout Palm Beach County. Our role is to serve as a trusted local presence—protecting the condition, security, and readiness of your home while you are away.

We conduct routine on-site visits, oversee property conditions, identify issues early, and coordinate trusted service providers when attention is required. Every visit is documented with clear reporting, photos, and follow-up actions so homeowners remain informed without being burdened by day-to-day oversight.

Palm Crest is designed for homeowners who value discretion, consistency, and peace of mind—knowing their property is being cared for with the same attention they would provide themselves.

ESTATE MANAGEMENT SERVICES

Routine Estate Oversight

- Scheduled property walkthroughs
- Interior and exterior condition checks
- Visual inspection for leaks, damage, or irregularities
- Security and access review

Routine Home Readiness Actions

Minor non-repair actions performed during scheduled visits to help maintain normal property conditions while the home is unoccupied.

- Retrieve mail or packages
- Run faucets to maintain plumbing traps
- Flush toilets and plumbing fixtures
- Adjust lighting or thermostats as needed
- Replace accessible HVAC air filters
- Perform simple home-readiness tasks appropriate for vacant properties

Note: These actions are limited to routine household tasks and do not constitute repair work, maintenance services, or licensed trade activity.

Seasonal & Storm Readiness

- Pre-arrival and departure inspections
- Storm readiness monitoring during routine visits
- Coordination of pre-storm preparation and post-storm condition inspections (as requested)
- Coordination of emergency services when required

Vendor & Service Coordination

- Liaison with trusted vendors and service providers
- Oversight of scheduled maintenance
- Confirmation of completed work
- Issue escalation when attention is needed

CUSTOMIZED SERVICE STRUCTURES

Structured Estate Oversight Includes:

Visit Frequency Options

- Weekly
- Bi-weekly
- Monthly
- Customized cadence based on property needs

Service Scope May Include

- Scheduled estate walkthroughs
- Condition documentation
- Photo and optional recorded reporting
- Vendor coordination & oversight
- Storm readiness monitoring during routine visits
- Priority issue escalation

Additional services beyond routine oversight are coordinated and billed separately unless otherwise agreed.

Monthly Retainer

Each engagement is structured as a customized monthly retainer based on:

- Property size
- Complexity
- Visit frequency
- Scope of coordination required

Service details, visit cadence, property-specific instructions, and monthly retainer are confirmed during your on-site consultation and onboarding.

Note:

When required for insurance or vacancy compliance, visit frequency may be adjusted to meet carrier requirements. Oversight cadence is confirmed during onboarding based on your property's needs.

HOW PALM CREST WORKS

1) Routine Estate Visits

- Scheduled property walkthroughs
- Interior and exterior condition checks
- Visual inspection for leaks, damage, or irregularities
- Security and access review

2) Ongoing Property Oversight

- Pre-arrival and departure inspections
- Storm readiness monitoring during routine visits
- Coordination of pre-storm preparation and post-storm inspections when requested
- Coordination of emergency services when required

3) Issue Identification

- Identification and prioritization of issues
- Coordination with appropriate service providers
- Escalation and resolution tracking as needed

4) Vendor Coordination

- Liaison with trusted vendors and service providers
- Oversight of scheduled maintenance
- Confirmation of completed work

REPORTING & FOLLOW-THROUGH

Clear communication and documented follow-through ensure nothing is missed.

1) Photo Documentation

- Visual documentation of property conditions and completed work
- Before-and-after images where applicable
- Clear records maintained for homeowner reference

2) Detailed Reporting

- Written visit summaries with observations and recommendations
- Status updates on identified issues or maintenance items
- Clear next steps when attention is required

3) Follow-up Confirmation

- Confirmation once issues are resolved or work is completed
- Ongoing monitoring of outstanding items
- Escalation only when necessary

Optional Recorded Walkthroughs

Optional recorded walkthroughs are available and customized based on each client's selected documentation preference. Media handling and retention policies are defined within the Client Onboarding Agreement.

OUR STANDARDS OF CARE

What We Do

- Provide consistent, professional estate oversight
- Act as a local point of contact for your property
- Document conditions clearly and objectively
- Coordinate trusted service providers
- Maintain discretion and confidentiality

What We Do Not Do

- Perform hands-on repairs or maintenance
- Act as a general contractor
- Replace licensed or insured professionals
- Make financial decisions without authorization

SAMPLE ESTATE VISIT REPORT

Date of Visit:

- March 12, 2026

Summary:

- The property was inspected and found to be in good overall condition. No active issues observed. Minor exterior maintenance recommendations noted.

Photo Documentation:



Exterior condition- no
issues observed



HVAC unit - operating
normally



Electrical panel -
compliant



Plumbing inspection -
no leaks detected

Status Indicators:

- Normal
- Attention Recommended
- Action Taken

SECURITY, ACCESS & PRIVACY

Your home, your privacy, and your peace of mind are always respected.

Secure Access & Key Handling

- Property access is limited strictly to Palm Crest and approved service providers
- Keys, codes, and access instructions are securely stored and carefully managed
- Access is logged and used solely for scheduled visits or approved services

On-Site Privacy Standards

- Visits are conducted with professionalism and discretion at all times
- Only inspection-related areas are accessed during walkthroughs
- No personal items are disturbed or photographed

Digital Records & File Security

- Inspection photos, reports, and recorded walkthroughs are securely stored
- Files are delivered privately to each homeowner
- Information is never shared without authorization
- All media is retained for a defined period and permanently deleted in accordance with client-selected documentation preferences.

Recorded Walkthrough Transparency (Optional)

- Continuous video documentation confirms on-site presence and inspection activity
- Provides homeowners with a clear, visual record of each visit
- Delivered securely alongside written reports and photo summaries

GETTING STARTED

A simple, streamlined process designed to make onboarding effortless.

1) Initial Consultation

- Introduction and brief discussion of your property and needs
- Scheduling of an on-site consultation

2) On-Site Consultation

- Review of property size, systems, and access points
- Discussion of visit cadence, priorities, and communication preferences
- Identification of insurance or vacancy requirements

3) Service Plan Confirmation

- Visit cadence, scope, and monthly retainer confirmed during consultation
- Defined monthly retainer structure
- Clear communication and reporting framework

4) Client Onboarding & Access Setup

- Execution of service agreement
- First month retainer processing
- Secure exchange of keys, codes, and access instructions
- Confirmation of privacy and security preferences

5) First Estate Visit

- Baseline walkthrough and condition assessment
- Documentation and photo reporting
- Establishment of ongoing oversight schedule

CONTACT & NEXT STEPS

We look forward to caring for your home as if it were our own.

Scheduling & Communication

- Schedule consultations and visits directly
- Ongoing communication via email or phone
- Responsive support for questions or updates

Next Step:

- Schedule your on-site consultation and secure ongoing oversight for your property