

JANUARY

- ☐ Q4 estimated tax due Jan 15 if you have rental or side income
- ☐ Collect Form 1098 and property tax receipts for your return
- ☐ Replace the HVAC filter
- ☐ Protect exposed pipes during cold snaps

FEBRUARY

- ☐ Gather rental income and expense records
- ☐ Look up your county's homestead exemption deadline
- ☐ Test the sump pump

MARCH

- ☐ File for homestead exemption if you are new to the home (Georgia: April 1)
- ☐ Test smoke and CO alarms when clocks change
- ☐ Book spring AC service

APRIL

- ☐ Federal tax return and Q1 estimated tax due Apr 15
- ☐ Watch for your property assessment notice; the appeal clock starts when it arrives (Georgia: 45 days)
- ☐ Clean gutters and check the roof after winter

MAY

- ☐ Assessment appeal deadlines fall now in many counties
- ☐ Termite inspection or bond renewal
- ☐ Check irrigation and drainage away from the foundation

JUNE

- ☐ Q2 estimated tax due Jun 15
- ☐ Hurricane season starts Jun 1: review wind and flood coverage (new flood policies usually wait 30 days)
- ☐ Replace the HVAC filter

JULY

- ☐ Mid year review of escrow and insurance
- ☐ Inspect deck, fence and exterior paint
- ☐ Clean the dryer vent

AUGUST

- ☐ Send lease renewal notices for leases ending in fall (notice windows often run 30 to 60 days)
- ☐ Schedule chimney and furnace service
- ☐ Check warranty expiration dates

SEPTEMBER

- ☐ Q3 estimated tax due Sep 15
- ☐ Clean gutters before leaves fall
- ☐ Seal gaps around windows and doors

OCTOBER

- ☐ Winterize outdoor faucets and irrigation
- ☐ Furnace service before the first cold night
- ☐ Review your homeowner's policy and deductible

NOVEMBER

- ☐ Test smoke and CO alarms when clocks change
- ☐ Property tax bills come due in many counties (Georgia: often November or December)
- ☐ Replace the HVAC filter

DECEMBER

- ☐ Pay property tax by Dec 31 if you want it on this year's return
- ☐ File receipts for improvements; they raise your home's cost basis
- ☐ Review next year's HOA budget and dues

EVERY YEAR, ON YOUR OWN DATES

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| ☐ Homeowner's insurance renewal | ☐ HOA dues and special assessments | ☐ Mortgage escrow analysis |
| ☐ Lease end dates and notice deadlines | ☐ Home and appliance warranty expirations | ☐ Permit and inspection renewals |