

PRIVATE RESIDENCE ARCHIVE • DEMONSTRATION EDITION

Alder House

A sample home archive for a fictional Lake Forest residence



Illustrative image created for this fictional sample; not a client residence.

SAMPLE ONLY Every name, address reference, contact detail, item, and identifier in this document is fictional. A real Everwell archive is privately scoped to the household and delivered through agreed secure channels.

Prepared by Everwell Home Archive • North Shore, Illinois • August 2026

SECTION 01

How to use this archive

One private reference for the home, its significant contents, and the records behind them.

The archive is designed to reduce dependence on memory. It brings photographs, item details, supporting documents, maintenance records, and trusted contacts into a single controlled reference that can be updated over time.

Archive section	Purpose	What it contains
Residence profile	Identity and stewardship	Household roles, core systems, archive version, and sharing scope
Inventory	Room-by-room record	Significant furnishings, art, collections, serials, documents, and photo references
Document index	Where records live	Policies, appraisals, invoices, warranties, renovation records, and review dates
Stewardship	What needs attention	Maintenance calendar, annual review, acquisitions, removals, and open tasks
Continuity	What to do when needed	Emergency references, adviser handoff, secure sharing, and access ownership

A real archive may be delivered as a private digital collection, a printed reference, or both, depending on the household's security and access preferences.

Everwell's role

- **Document.** Photograph and describe significant household contents and connect them to available supporting records.
- **Organize.** Build a durable naming, indexing, and update system the household can maintain.
- **Coordinate.** Prepare orderly reference material that a client may share with chosen advisers.

IMPORTANT BOUNDARY Everwell does not appraise or value property, recommend insurance coverage, provide legal or tax advice, guarantee claim outcomes, or replace the work of licensed advisers.

SECTION 02

Residence profile

The archive starts with ownership, stewardship, version control, and clearly defined access.

Profile field	Current record
Archive ID	EHA-SAMPLE-001
Residence	Alder House — Lake Forest, Illinois (fictional)
Prepared for	Demonstration household
Archive version	1.0 • documented August 2026
Archive steward	Homeowner representative
Distribution	Private • homeowner-controlled • adviser access by invitation only

Key contacts

Role	Contact	Email	Phone
Homeowner representative	Avery Rowan	avery.rowan@example.com	312-555-0104
Household manager	Jordan Lee	jordan.lee@example.com	312-555-0112
Insurance adviser	Taylor Morgan	t.morgan@example.com	312-555-0128
Estate counsel	Morgan & Field LLP	estates@example.com	312-555-0137
Property service lead	North Shore Property Care	dispatch@example.com	847-555-0142

All contacts above are fictional and use example.com or reserved 555 numbers.

ACCESS PRINCIPLE Store the full archive in one homeowner-controlled location. Share only the relevant sections, for a defined purpose, with a named recipient. Revoke access when the purpose ends.

SECTION 03

Room-by-room inventory sample

A practical record connects each significant item to identifying details, documents, and photographs.

Item ID	Room / item	Identifying details	Supporting records	Photo ref.
LIB-001	Library • abstract oil on linen	48 × 60 in.; signed 'A. Mercer' lower right; gilt wood frame	2022 invoice; adviser schedule reference	P-001-004
LIB-002	Library • pair of custom club chairs	Deep green mohair; ebonized oak legs; maker label beneath seat	Design invoice; fabric specification	P-005-007
FOY-001	Foyer • longcase clock	Walnut case; moon-phase dial; movement no. ending 417	2020 service receipt; family note	P-008-011
DIN-001	Dining room • extension table	Mahogany; three leaves; custom protective pads stored separately	Purchase invoice; restoration record	P-012-015
DIN-002	Dining room • sterling service	Twelve-place setting; engraved family cipher; 148 pieces	Inventory count; appraisal reference	P-016-022
MUS-001	Music room • grand piano	Ebonized case; serial ending 8421; restored 2024	Restoration invoice; technician report	P-023-028
PRI-001	Primary suite • jewelry case	Selected pieces indexed individually; storage detail withheld	Appraisal references; photographs	P-029-036
KIT-001	Kitchen • range and ventilation	Custom integrated installation; model/serial labels captured	Warranties; service records	P-037-041

Item IDs remain stable even if an item moves rooms. Values are intentionally omitted; licensed appraisers and advisers maintain valuation and coverage records.

CAPTURE STANDARD For each selected item: overall view, maker or signature, identifying marks, serial or model, condition note, supporting document reference, and the date captured.

SECTION 04

Significant items & collections

A focused register makes adviser conversations and family continuity easier without turning the archive into an appraisal.

Register ID	Category / item	Identifier or provenance	Records linked	Next review
ART-001	Fine art • oil on linen	Signed; reverse label photographed; provenance memo on file	Invoice and appraisal reference	Review with adviser in 2027
JEW-001	Jewelry • sapphire ring	Maker mark and inscription photographed; dimensions recorded	Appraisal reference; purchase record	Update photos after service
WCH-001	Watch • mechanical wristwatch	Case number ending 2098; box and papers retained	Invoice; service receipt	Service due 2028
SIL-001	Silver • family service	Engraved cipher; piece count and pattern recorded	Count sheet; appraisal reference	Confirm distribution memo
WIN-001	Wine • cellar collection	Collection tracked by bottle and case in separate register	Purchase exports; cellar report	Quarterly acquisition update
MUS-001	Instrument • grand piano	Serial ending 8421; restoration history documented	Restoration invoice; technician report	Annual tuning each September

Privacy treatment

- **Separate access details.** Exact storage locations, combinations, alarm information, and credentials never appear in the shareable register.
- **Use partial identifiers.** Public or adviser-facing extracts may show only the last four characters of a serial or policy number.
- **Share by purpose.** An appraiser, insurer, family member, and household manager may each receive different sections.

SAMPLE CONVENTION 'Storage detail withheld' means the sensitive location is kept in a separate homeowner-controlled access record, not in this shareable archive.

SECTION 05

Document & insurance index

The index points to current records without duplicating credentials or replacing adviser-controlled documents.

Document	Purpose	Record date	Archive location	Review / action
Homeowners declarations	Insurance / current term	2026-07-01	Secure archive • Insurance	Review by 2027-07-01
Personal umbrella declarations	Insurance / current term	2026-07-01	Secure archive • Insurance	Review with annual program
Scheduled property summary	Insurance / selected items	2026-07-01	Secure archive • Insurance	Confirm additions quarterly
Fine art appraisal reference	Adviser-issued report	2025-11-14	Secure archive • Appraisals	Ask adviser about update cycle
Jewelry appraisal reference	Adviser-issued report	2026-02-10	Secure archive • Appraisals	Update after material changes
Library design invoices	Purchase and specification records	2024-05-18	Secure archive • Library	Retain permanently
Kitchen renovation binder	Contracts, selections, permits, warranties	2023-09-22	Secure archive • Property	Review warranties annually
Major appliance warranties	Model, serial, term, service	Various	Secure archive • Warranties	Check expirations each January

Dates and records are fictional. A real archive references the household's authoritative policies, appraisals, contracts, and adviser files.

INSURANCE BOUNDARY This index helps the household locate documentation. Coverage limits, scheduled property, appraisal requirements, loss procedures, and claim decisions remain the responsibility of the client and licensed insurance professionals.

SECTION 06

Maintenance & stewardship calendar

Documenting the home includes the systems, finishes, and specialist work that preserve it.

When	Asset / system	Planned action	Owner / provider	Record retained
January	HVAC and humidification	Annual service; photograph updated model and filter labels	Mechanical contractor	Service report
February	Standby generator	Load test; confirm maintenance log and fuel-service contact	Generator specialist	Test report
March	Art environment	Review humidity record and direct-light exposure in priority rooms	Household manager	Quarterly note
April	Roof and copper gutters	Exterior inspection after winter; photograph concerns before work	Roofing specialist	Inspection photos
May	Irrigation and landscape	Startup, zones, controller ownership, and vendor documentation	Landscape service	Zone map / invoice
September	Chimneys and fireplaces	Inspection and cleaning before heating season	Chimney specialist	Inspection record
October	Boiler and radiant systems	Pre-season service; update emergency contact and shutoff notes	Mechanical contractor	Service report
November	Security and access	Review authorized users; remove departed vendors and old devices	Homeowner	Access review note
December	Archive stewardship	Add acquisitions, removals, invoices, warranties, and new photographs	Everwell / homeowner	Annual version

UPDATE DISCIPLINE The archive stays useful when every significant acquisition, renovation, service event, move, gift, or disposition creates one small update instead of a future reconstruction project.

SECTION 07

Emergency & continuity reference

People and safety come first. The archive supports orderly next steps only when it is safe to use.

Reference	Fictional sample record
Life safety	Call 911 for fire, medical, or immediate danger. Do not enter an unsafe structure.
Main water shutoff	Mechanical room, east wall; valve and approach photographed in private facilities section.
Electrical service	Lower-level service room; panels labeled by floor and major system.
Gas service	Exterior north-side meter; emergency shutoff handled by qualified personnel.
Fire extinguishers	Kitchen pantry and garage entry; inspection date recorded in maintenance log.
Generator	West service yard; manual and maintenance contact in property systems folder.
Archive access	Homeowner-controlled secure folder; recovery instructions held separately by designated representative.

If property is damaged

1. Protect people first and follow emergency or municipal instructions.
2. Photograph conditions only when it is safe and permitted.
3. Contact the appropriate insurer or licensed adviser using the current policy records.
4. Record affected Everwell item IDs and their related photo and document references.
5. Preserve damaged property and related receipts until the adviser gives direction.
6. Share only the relevant archive extract through an agreed secure channel.

NOT AN EMERGENCY PLAN The archive is a reference, not a substitute for emergency services, professional safety planning, insurer instructions, or qualified contractors.

SECTION 08

Digital access & sharing protocol

The archive records ownership and recovery pathways—never passwords, one-time codes, or security answers.

Account / system	Business owner	2FA custodian	Recovery rule
Private archive folder	Homeowner representative	Homeowner + designated representative	Recovery through homeowner-controlled secure vault
Master photo library	Homeowner representative	Homeowner	Recovery channel recorded outside this archive
Insurance portal	Insurance adviser / homeowner	Homeowner	Use insurer's official recovery process
Property service portal	Household manager	Household manager	Revoke vendor access after work ends
Smart-home administration	Homeowner representative	Homeowner + household manager	Device inventory kept in restricted systems file

Sharing matrix

Recipient	Sections shared	Access method	Review cadence
Homeowner	Full archive	Primary secure repository	Continuous
Household manager	Operational systems and maintenance	Role-based folder	Quarterly
Insurance adviser	Relevant inventory and document index	Time-limited secure share	As requested
Estate counsel	Index and chosen tangible-property records	Time-limited secure share	As requested
Family representative	Annual summary only	Secure view-only share	Annually

NEVER STORE HERE Passwords, passcodes, alarm codes, safe combinations, private keys, full financial account numbers, security answers, or one-time recovery codes.

SECTION 09

Annual review summary

Version 1.1 would preserve the year's changes and leave a short, auditable action list.

ILLUSTRATIVE YEAR IN REVIEW Three additions documented • one item transferred • two warranties updated • one appraisal cycle to confirm • no access exceptions open.

Change	Record	Documentation action	Status
Added	LIB-003 • ceramic vessel pair	Invoice and maker record uploaded	Complete
Added	SYS-004 • replacement HVAC unit	Model, serial, warranty, and service contact captured	Complete
Transferred	SIL-001 • family silver service	Family transfer note retained; recipient details restricted	Complete
Updated	Kitchen appliance warranties	New term dates and service contacts indexed	Complete
Review	ART-001 • fine art record	Ask licensed adviser whether appraisal update is needed	Open
Access	Former landscape vendor	Portal access removed and review logged	Complete

Next twelve months

- **Complete one quarterly update.** Add new acquisitions, dispositions, and material service records.
- **Confirm adviser cycles.** Ask the appropriate professionals about appraisal, policy, and estate-record review dates.
- **Recheck access.** Remove old vendors, test recovery channels, and confirm the designated representative.
- **Prepare version 1.1.** Everwell consolidates the year's updates into the maintained archive.

PRIVATE CONSULTATION Everwell designs each archive around the home, the household's priorities, and the advisers already involved. Request a consultation at everwellhomearchive.com or hello@everwellhomearchive.com.

EVERWELL HOME ARCHIVE • DISCREETLY DOCUMENTED. THOUGHTFULLY MAINTAINED.