
— EK METHOD BRIEF · No. 08

The EK Onboarding Engagement

The comprehensive baseline documentation visit that establishes the property record, builds the EK Vault™, and makes the beginning of weekly oversight possible — a stand-alone deliverable of lasting fiduciary value.

— THE PREMISE

Before the Weekly Record Begins, the Baseline Must Exist.

Weekly oversight is only as meaningful as the baseline it is measured against. Without a documented starting point — a timestamped, comprehensive record of the property's condition, systems, and components at the moment EK engagement begins — there is no way to identify change, confirm improvement, or demonstrate that a condition predated EK's involvement.

The EK Onboarding Engagement establishes that baseline. It is the first and most comprehensive visit EK conducts at any property — a full-day documentation engagement that produces the foundation upon which every subsequent weekly visit is built. It is not a preliminary walkthrough. It is a complete, professional record in its own right.

“The documentation you receive at onboarding is yours to keep permanently — regardless of how long EK service continues.”

— Estate Keepers Onboarding Standard

— THE DISTINCTION

A Complete Baseline. Not a Setup Visit.

The EK Onboarding Engagement is frequently misunderstood as an administrative prerequisite — something that must be completed before the real service begins. It is not. It is a substantive, fiduciary-grade documentation engagement that produces a set of deliverables no subsequent weekly visit will replicate in scope or depth.

A standard weekly visit is focused: targeted documentation, system cycling, condition verification. The onboarding engagement is comprehensive: every accessible space documented, every significant system identified and recorded, accessible major components serialized and researched, the entire property mapped into a structured Vault from scratch. The scope is categorically different.

	ONBOARDING ENGAGEMENT	STANDARD WEEKLY VISIT
Scope	Every accessible space, system, and significant component	Targeted documentation per zone protocol
Photography	80–200+ curated images — full baseline coverage	20–100 images — condition and change focused
360° Capture	Full interior and exterior — every authorized room	Monthly rotation — one type per visit
Drone Aerial	Complete property aerial documentation	Monthly rotation · Week 3
Thermal Imaging	Full-property baseline thermal scan	HOT zones every visit · Monthly rotation · Week 4
CCR	Full Component Condition Report built from scratch	Updated annually or following significant system change
EK Vault™	Built and populated from zero	Updated during each visit
Property Flow Manual	Created — access protocol, cycling sequence, contacts	Maintained and updated as conditions change
Duration	5–8+ hours on-site depending on tier and complexity	3–6 hours depending on tier

— WHAT IT PRODUCES

Eight Deliverables. All Yours to Keep.

The EK Onboarding Engagement produces a complete set of permanent documents and records. Every item below is delivered before the inspector leaves the property and archived in the EK Vault™ immediately upon completion.

— **Full Onboarding Inspection Report**

A comprehensive Spectora report covering every accessible space and system — narrative findings, condition ratings, and embedded media. The most complete single-visit inspection report the property will ever receive.

— **Component Condition Report (CCR)**

A documented condition record of accessible, significant powered and motorized components — primary appliances, HVAC systems, water systems, electrical equipment, security systems, and home technology. Each component is researched by serial number for manufacturer specs, expected lifespan, known vulnerabilities, and maintenance status. Countertop appliances, small kitchen equipment, and personal electronics are outside CCR scope. Updated annually or following a significant system change.

— **EK Vault™ — Built and Populated**

All ten Vault folders created and populated with onboarding documentation. Fiduciary access credentials provided. The property's permanent digital record is live and accessible from the moment the inspector departs.

— **Full Baseline Photography Archive**

Curated still photography of every authorized interior and exterior area — timestamped, metadata-preserved, and organized by space within the Vault.

— **360° Interior & Exterior Captures**

Complete navigable 360° documentation of all authorized interior rooms and exterior elevations. Allows the fiduciary to conduct a remote visual inspection of the entire property from any device, at any time.

— **FAA Part 107 Aerial Drone Documentation**

Full aerial documentation of the property — roofline, gutters, drainage, pool surround, perimeter, and estate grounds. The baseline aerial record against which all future monthly drone captures are compared.

— **Full-Property Thermal Imaging Baseline**

FLIR thermal scan of all electrical panels, HVAC systems, plumbing access points, and moisture-prone surfaces. Establishes the thermal baseline from which all future anomalies are identified.

— **Property Flow Manual**

A written, property-specific walkthrough document covering access protocol, alarm sequences, system locations, Estate Cycling™ sequence, vendor contacts, escalation contacts, and known conditions. Enables any EK-certified inspector to conduct a compliant visit without prior property familiarity.

— **Initial EK Carrier Summary Report**

A carrier-facing confirmation of EK engagement, service tier, weekly visit cadence, documentation standard, and Estate Cycling™ protocol — formatted for submission to the underwriting file at policy renewal.

CCR Scope Note: The Component Condition Report covers accessible, significant powered and motorized components that are material to the property's operational condition and can be identified by manufacturer, model, or serial number. Countertop appliances, small kitchen equipment, personal electronics, and decorative or portable items are outside CCR scope by design. The CCR is a stewardship record — not an inventory.

— THE PROCESS

Six Steps. One Seamless Engagement.

The EK Onboarding Engagement follows a defined sequence from first contact through Vault delivery. Every step is documented. No property access occurs until authorization is fully complete.

0
1**Consultation & Tier Confirmation**

A brief conversation to confirm the property profile, service tier, and onboarding fee. Applicable addenda — outer island, PPC, or custom scope — are identified. No access occurs at this stage.

0
2**Service Authorization & Intake**

A Service Authorization & Intake Form establishes access boundaries, authorized spaces, occupancy status, escalation contact preferences, and any restricted areas. Unauthorized areas are defined and respected absolutely throughout the engagement.

0
3**Onboarding Fee Invoiced & Collected**

The onboarding engagement fee is invoiced through EK's billing system and collected in advance of the first visit. Monthly retainer billing begins the following week. Mid-month starts are prorated.

- Payment accepted via ACH (preferred) or credit card
- Outer-island onboarding includes logistics — no supplement applies
- The onboarding documentation is yours to retain permanently

0
4**Onboarding Visit — Full Day On-Site**

The principal inspector conducts the full onboarding engagement — access verification, property orientation, Estate Cycling™ baseline, complete media capture across all authorized spaces, accessible component serialization, and CCR documentation. Duration varies by tier and complexity.

- Signature tier: approximately 5–6 hours on-site
- Premier tier: approximately 6–7 hours on-site
- Legacy tier: approximately 7–8+ hours on-site

0
5**On-Site Report Submission & Vault Build**

Before leaving the property, the inspector submits the full Spector onboarding report, populates all ten EK Vault™ folders with onboarding documentation, and confirms upload completion. The fiduciary receives same-day notification that the Vault is live and accessible.

- Independent Starlink connectivity used where estate internet is unavailable
- No documentation leaves the property incomplete
- Vault access credentials delivered to designated fiduciary contact

0
6**Weekly Oversight Begins**

Following Vault delivery, weekly oversight begins the following week at the applicable service tier. Schedule, cadence, and communication preferences are confirmed. From this point, Estate Keepers operates quietly in the background — four visits per month, 48-week service year, without exception.

— THE ONBOARDING FEE

One-Time Fee. Permanent Value.

The onboarding engagement fee is a one-time charge billed in advance of the first visit. It covers the full day of on-site documentation, CCR research and production, EK Vault™ build, Property Flow Manual, all baseline media, and the initial Carrier Summary Report. There is no monthly equivalent — the onboarding scope is not repeated in any subsequent weekly visit.

Signature \$3,000 Onboarding fee Up to ~4,500 sq ft	Premier \$5,000 Onboarding fee 4,500–7,000 sq ft	Legacy \$10,000+ Onboarding fee 7,000+ sq ft · Quoted
--	---	--

The onboarding documentation package is yours to retain permanently as a standalone record of property condition — regardless of how long EK service continues thereafter. If service is never engaged beyond the onboarding visit, the fiduciary still holds a complete, professionally produced baseline documentation of the estate.

— THE FIDUCIARY VALUE

A Defensible Starting Point for Everything That Follows.

Every question a fiduciary will ever be asked about a property's condition begins with the baseline. The onboarding engagement is that baseline — the documented, timestamped, independently produced record that answers the first and most important question: *what was the condition of this property when professional oversight began?*

FIDUCIARY CONSIDERATION	HOW THE ONBOARDING ENGAGEMENT RESPONDS
"What condition was the property in when EK began?"	The onboarding report establishes a timestamped, comprehensive baseline. Every condition that predated EK involvement is documented — separating prior history from EK's period of oversight.
"How do I know what systems exist and what shape they're in?"	The CCR documents accessible, significant powered components by serial number — manufacturer, age, lifespan, vulnerabilities, and maintenance status. It is the most complete major-system record the property will ever have.
"Can I share this documentation with the carrier?"	The initial Carrier Summary Report is formatted for the underwriting file. The onboarding report, aerial imagery, and thermal baseline can all be provided to support renewal conversations.
"What if a new trustee takes over the property?"	The EK Vault™ and Property Flow Manual provide complete continuity. The incoming trustee receives a full documented history from day one — no reconstruction required.
"Is this documentation legally defensible?"	All onboarding media is timestamped, metadata-preserved, and produced under the EK Media Standard™ — a named, documented protocol designed specifically for fiduciary and legal defensibility.

— THE SUMMARY

Where the EK Record of Care™ Begins.

The EK Onboarding Engagement is the foundation of everything Estate Keepers produces on behalf of a property and its fiduciary. The CCR, the Vault, the Property Flow Manual, the baseline imagery, the thermal record — all of it begins here. Weekly oversight builds on top of it. The EK Record of Care™ grows from it. The fiduciary's defensible position depends on it.

It is the most important visit EK will ever conduct at a property. It is treated accordingly.

The property record does not begin when oversight begins. It begins when the baseline is established. That is what the EK Onboarding Engagement delivers.

Estate Keepers · Method Brief No. 08 · The EK Onboarding Engagement Part of the EK Method™ brief series — available upon request.