

— EK METHOD OVERVIEW

The EK Method™

Eight integrated elements. One continuous result. The complete operating methodology behind every Estate Keepers engagement — from baseline documentation through permanent record.

— THE PREMISE

A Method Is Not a Menu.

Most property oversight services offer a list of things they can do. Inspections are available. Photography is available. Reports are available. Each is a separate offering, performed at varying intervals, by varying personnel, to no consistent standard. The result is a collection of disconnected activities that individually feel like oversight but together produce nothing a fiduciary can stand behind.

The EK Method™ is not a menu. It is a methodology — eight integrated elements that operate together, on a fixed weekly schedule, under consistent documented protocols, to produce a single result: a continuous, timestamped, fiduciary-grade record of property condition that is defensible under any scrutiny.

Every element depends on the others. Remove one and the record has gaps. Compromise one and the standard breaks down. The EK Method™ is designed as a system — and it is delivered as one, every week, without exception.

“A service can be evaluated. A method can be trusted.”

— Estate Keepers

— WHAT THE METHOD PRODUCES

One Continuous Result. Three Dimensions.

Every element of the EK Method™ contributes to one of three dimensions of the property record. Understanding these dimensions is the fastest way to understand why the method is structured the way it is.

DIMENSION	WHAT IT MEANS	ELEMENTS THAT PRODUCE IT
Condition	A verified, timestamped record of the property's physical state — systems, components, and spaces — at every point in time.	Weekly Estate Oversight · Estate Cycling™ · Risk Zone Model · EK Media Standard™
Continuity	A record that does not have gaps — one that exists for every week of the engagement and can account for any date within it.	EK Vault™ · EK Record of Care™ · No Homework Protocol · EK Media Standard™
Defensibility	A record that was produced under a named, documented methodology and can be explained, produced, and stood behind in any professional or legal context.	Escalation Protocol · EK Media Standard™ · EK Vault™ · EK Record of Care™

— THE METHOD

Eight Elements. One System.

The EK Method™ comprises eight integrated elements. Each is described briefly below. Each has a dedicated brief available for deeper review.

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Weekly Estate Oversight

The governing service commitment

1

Four verified on-site inspection visits per calendar month, across a 48-week service year. Fixed schedule. Same inspector. Same protocol. The visit is the heartbeat of the entire method — everything else is built around it and depends on it.

Role in the method: Provides the weekly cadence that makes continuity possible and the independent presence that makes the record credible.

See: EK Method Brief No. 04 · Weekly Estate Oversight

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EK Onboarding Engagement™

The baseline that makes everything measurable

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A comprehensive full-day documentation visit that establishes the property record before weekly oversight begins. Produces the CCR, the Vault, the Property Flow Manual, full baseline photography, 360° captures, aerial drone, and thermal baseline. The most complete single-visit documentation any property will receive.

Role in the method: Every subsequent visit is measured against this baseline. Without it, change cannot be identified and pre-existing conditions cannot be separated from new ones.

See: EK Method Brief No. 08 · The EK Onboarding Engagement

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Estate Cycling™

The activation standard that confirms operation, not just presence

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Every system built to run is run. Every fixture flushed. Every mechanism cycled. Every circuit confirmed. Estate Cycling™ is the protocol that distinguishes EK from a walk-through service — it produces an operational record, not just a visual one.

Role in the method: Converts a visit into a verified operational confirmation. A system that has not been activated has not been verified.

See: EK Method Brief No. 01 · Estate Cycling™

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Risk Zone Model & Escalation Protocol

The structure that governs where to look and what to do with what is found

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The Risk Zone Model assigns every area of a property to HOT, WARM, or COLD based on failure probability and remediation cost. The Escalation Protocol classifies every finding as Green, Amber, or Red — triggering a defined response at each level. Together they replace subjective judgment with a documented, reproducible system.

Role in the method: Ensures every inspection is conducted the same way and every finding is handled the same way — regardless of inspector or property.

See: EK Method Brief No. 07 · Risk Zone Model & Escalation Protocol

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EK Media Standard™

The protocol that governs how every capture is made, curated, and kept

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A named, documented protocol governing what is captured, how it is captured, what is retained, and how it is delivered on every visit. Timestamp integrity, file standards, curation discipline, and inspector compliance requirements are defined and auditable. Media produced under the EK Media Standard™ is producible in any professional context.

Role in the method: Transforms photography from a personal habit into a governed record. The standard behind the image is what makes the image defensible.

See: EK Method Brief No. 05 · EK Media Standard™

06

Ready State™

The verified condition the method is designed to maintain

The documented standard in which a property is fully operational, immediately livable, system-confirmed, and prepared for use at any moment. Ready State™ is not a claim — it is a condition produced by the consistent application of every other element in the method, verified weekly, and documented permanently.

Role in the method: The outcome measure. If the method is working, the property is in Ready State™. If it is not, the escalation protocol has already identified why.

See: EK Method Brief No. 02 · Ready State™

07

EK Vault™

The secure archive where the entire record lives

A property-specific, password-protected digital archive updated during each visit before the inspector departs. Ten organized folders covering every category of EK documentation. Accessible to authorized parties from anywhere in the world.

Permanent retention. No IT requirement on the estate.

Role in the method: The delivery mechanism that converts field documentation into an accessible, organized, fiduciary-grade record. Without the Vault, the method produces documents. With it, it produces a living archive.

See: EK Method Brief No. 06 · EK Vault™

08

EK Record of Care™

The cumulative result of the entire method over time

The complete, continuously growing body of documentation produced by every EK visit, report, photograph, thermal image, escalation, and annual summary across the life of the engagement. It is not a single document. It is the permanent record that accumulates week by week, year by year — and grows more valuable with every visit.

Role in the method: The ultimate fiduciary instrument. A property with five years of EK Record of Care™ has something no inspection, no appraisal, and no property manager can produce: a continuous, independent, documented history of stewardship.

See: EK Method Brief No. 03 · EK Record of Care™

— THE SYSTEM

How the Eight Elements Work as One.

The EK Method™ is not eight parallel services. It is a linear flow with reinforcing loops — each element feeding the next, each dependent on the ones before it. The sequence matters.

ELEMENT	FEEDS INTO	DEPENDS ON
Onboarding Engagement	Vault · CCR · Property Flow Manual · all baselines	Written authorization · Service agreement
Weekly Estate Oversight	Every visit report · Vault update · Escalation log	Onboarding baseline · Zone assignments
Estate Cycling™	Operational confirmation in each visit report	Property Flow Manual · Zone protocol
Risk Zone Model	Inspection focus and thoroughness on every visit	Onboarding zone assignments · Prior visit findings
Escalation Protocol	Fiduciary notification · Escalation log · Resolution record	Zone model findings · Classification thresholds
EK Media Standard™	Every photograph, thermal, aerial, and 360° capture	Device standards · Timestamp protocol · Curation discipline
Ready State™	Client confidence · Carrier narrative · Fiduciary position	All six elements above operating consistently
EK Vault™	Accessible record for fiduciary, carrier, attorney, beneficiary	Every visit · On-site upload · No Homework protocol
EK Record of Care™	Annual Fiduciary Summary · Carrier report · Legal record	Vault continuity · Every prior visit without gap

— THE FIDUCIARY SIGNIFICANCE

What a Methodology Means to the Fiduciary.

A service can be evaluated in the moment — did someone show up, did they take photographs, did they send a report. A methodology can be relied upon over time — because it is documented, consistent, and produces the same result regardless of who applies it.

For a corporate trustee, probate attorney, or family office, that distinction is the difference between a vendor relationship and a fiduciary resource. A vendor performs tasks. A methodology produces a record. The EK Method™ is why the EK Record of Care™ is something a fiduciary can actually use in a beneficiary review, an insurance claim, a court proceeding, or a trustee accounting.

WITHOUT A METHOD	WITH THE EK METHOD™
Documentation quality varies by inspector and visit	Every visit produces the same structured record under the same protocol
No defined response when a condition is found	Escalation protocol classifies every finding and triggers a defined response
Record has gaps — some visits documented, others not	Continuous record — 48 visits per year, every one archived in the Vault
Fiduciary cannot account for stewardship on a specific date	Green / Amber / Red classified report exists for every visit date
A new inspector must start from scratch	Property Flow Manual enables any EK inspector to cover the property to standard
Property oversight is a vendor expense	Property oversight is a fiduciary instrument — and a carrier argument

— GOING DEEPER

The Full Brief Series.

Each element of the EK Method™ has a dedicated brief available upon request. The briefs go deeper on the methodology, fiduciary implications, and operational protocols behind each element. They are designed for brokers, fiduciaries, and institutional professionals who want to understand the standard behind the service.

BRIEF NO.	TITLE	AUDIENCE
01	Estate Cycling™	Fiduciaries · Trustees · Attorneys
02	Ready State™	Owners · Fiduciaries · Brokers
03	EK Record of Care™	Fiduciaries · Attorneys · Courts
04	Weekly Estate Oversight	All audiences — primary introduction brief
05	EK Media Standard™	Fiduciaries · Carriers · Legal professionals
06	EK Vault™	Fiduciaries · Brokers · Family offices
07	Risk Zone Model & Escalation Protocol	Fiduciaries · Trustees · Attorneys
08	The EK Onboarding Engagement	All audiences — pre-engagement reference
PPC	Personal Property Cataloging	Owners · Fiduciaries · Insurance professionals

— THE SUMMARY

The Method Is the Difference.

There are other services that inspect properties. There are other services that photograph them. There are property managers who visit periodically and report what they see. None of them operate under a named, documented, integrated methodology that produces a continuous, classified, escalation-coded, Vault-archived, fiduciary-grade record of stewardship.

The EK Method™ is not a differentiator. It is the definition of what professional estate oversight actually requires — and what has been missing from the Hawaii luxury residential market until now.

Eight elements. One method. One result that compounds in value with every passing week.