


# Intake & Service Agreement

Safe and Sound provides neutral, monitored property services for parties who require a third-party professional to document activities involving personal property or real property. Safe and Sound offers a variety of different services. Not all are the same. Multiple services can be completed at the same time. If you have questions about which service best fits your needs please contact Safe and Sound to discuss the best option for you. This agreement is for:

☐ **Monitored Inventory Walkthrough** ☐ **Monitored Personal Property Retrieval**

☐ **Monitored Inspection Walkthroughs** ☐ **Monitored Appraisal Walkthroughs**

☐ **Other:** _____

## SECTION 1 — PARTY & CASE INFORMATION (If Applicable)

**Court Case Number**_____

**Which Courthouse**_____

**Case Type / Matter**_____

**Date Services Requested**_____

☐ Court Order ☐ Stipulation / Agreement ☐ Attorney Request

☐ Mutual Agreement of the Parties ☐ Other: _____

### PARTY A

**Full Name**_____

**Address**_____

**City / State / Zip**_____

**Phone**_____

**Email**_____

**Attorney Name (If Applicable)**_____

**Attorney Email**_____

**Attorney Phone**_____




## PARTY B

**Full Name**_____

**Address**_____

**City / State / Zip**_____

**Phone**_____

**Email**_____

**Attorney Name (If Applicable)**_____

**Attorney Email**_____

**Attorney Phone**_____

## SECTION 2 — RETENTION OF SAFE AND SOUND

☐ Jointly Retained ☐ Single Party Retained

Jointly Retained: Both parties are jointly retaining Safe and Sound for the requested Monitored Property Services. Both parties agree to the applicable terms, fees, procedures, and service requirements.

Single Party Retained: One party is independently retaining Safe and Sound for the requested services. Safe and Sound's role is limited to the services specifically requested and agreed to and does not constitute legal representation, advocacy, or representation of either party.

**Retaining Party (if single-party retained)**_____

**Non-Retaining Party / Other Party**_____

☐ Party A pays ☐ Party B pays ☐ Parties pay equally

**Other payment arrangement**_____

## SECTION 3 — SERVICE REQUEST

**Primary Service Requested:** Safe and Sound offers a variety of different services. Not all are the same. Multiple services can be completed at the same time. If you have questions about which service best fits your needs please contact Safe and Sound to discuss the best option for you.

☐ **#1 Monitored Inventory Walkthroughs** ☐ **#2 Monitored Personal Property Retrieval**

☐ **#3 Monitored Inspection Walkthroughs** ☐ **#4 Monitored Appraisal Walkthroughs**

☐ **#5 Other: _____**

▢ **#1 Monitored Inventory Walkthrough: This service is for building an inventory list of personal belongings to be collected at another time. Safe and Sound can complete the walkthrough with your presence or go to the residence for you and take photos of all rooms so you can generate a list of items to be collected at another time.**

****Please explain the scope of inventory to document during the walkthrough.**

_____

_____

_____

_____

_____

_____

_____




▫ **#2 Monitored Personal Property Retrieval: This service is where Safe and Sound will document and monitor the actual retrieval of personal property. Safe and Sound does not assist in the actual moving or collecting of property. Safe and Sound documents the process.**

**Is there a pre-agreed upon list of items to be retrieved?**

☐ Yes ☐ No

A pre-agreed upon list or specified items description must be provided to Safe and Sound before the scheduled retrieval service.

**Attach the agreed-upon list to this intake form or provide it separately to Safe and Sound prior to the service date.

**Who established or approved the list: _____**

☐ Other party received list ☐ Other party has not received list ☐ Not Applicable
☐ Unknown

Safe and Sound will use the provided list and/or agreed-upon scope to identify property authorized for retrieval. Requests to retrieve additional items not identified in the agreed scope may require authorization from the appropriate party or parties before Safe and Sound proceeds.

During this service, only items on the agreed upon list shall be retrieved. If no agreement on items not listed, they shall be collected at another time.

Initials: _____




▢ **#3 Monitored Inspection Walkthrough: This service is for those who would like Safe and Sound to be present to document and monitor an inspection walkthrough.**

**Property / location to be inspected**

_____

**Purpose of inspection**

_____

**Inspector / company, if known (Safe and Sound does not coordinate with Inspectors)**

_____

▢ **#4 Monitored Appraisal Walkthrough: This service is for those who would like Safe and Sound to be present to document and monitor an appraisal walkthrough.**

**Property / location to be appraised**

_____

**Appraiser / appraisal company, if known (Safe and Sound does not coordinate with appraisers)**

_____




☐ **#5 Other Monitored Property Service**

**Describe requested service**

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____




## SECTION 4 — PROPERTY & SERVICE LOCATION

**Primary Service Address**

_____

**City / State / Zip**

_____

**Additional Location 2 (If Applicable)**

_____

**Additional Location 3 (If Applicable)**

_____

**Additional Location 4 (If Applicable)**

_____

## SECTION 5 — SERVICE DETAILS

**Requested Date(s)**

_____

**Requested Time / Time Window**

_____

**Estimated Duration**

_____

**Will either party be physically present?**

☐ Party A ☐ Party B ☐ Both ☐ Neither ☐ Other_____

**Will other third parties be present?**

☐ No ☐ Yes

**Third-party name / role / purpose:**_____




## SECTION 6 — ACCESS & SPECIAL INSTRUCTIONS

**How will Safe and Sound obtain access?**

☐ Party A ☐ Party B ☐ Owner / Authorized Person ☐ Property Manager / Agent
☐ Other_____

**Known access restrictions?**

☐ No ☐ Yes

**Details:**

_____

**Known safety concerns, restrictions, or special circumstances?**

☐ No ☐ Yes

**Details:**

_____

**Areas Safe and Sound is NOT authorized to enter and by whom?**

☐ No ☐ Yes

**Details:**

_____

## SECTION 7 — OTHER DOCUMENTS

Safe and Sound may request additional documentation or information when reasonably necessary to understand the requested service and determine whether the service can safely and appropriately be performed.

## SECTION 8 — PRE-SERVICE INFORMATION

Safe and Sound may conduct a brief telephone or Zoom meeting before services are performed to gather information, clarify the scope of services, identify potential safety concerns, and determine appropriate procedures for the assignment.




**Additional information Safe and Sound should know before services _____**

_____

_____

_____

_____

_____

## SECTION 9 — MONITORING & DOCUMENTATION

I understand that Safe and Sound may document the performance of Monitored Property Services through written notes, photographs, video, or other documentation as appropriate to the service requested.

I understand and consent to documentation of the service.

I understand that documentation may be provided to the parties and/or other authorized recipients as applicable to the service arrangement, court order, written agreement, or authorization.

I understand Safe and Sound is to monitor and document the property services. Safe and Sound does not assist in moving items for property retrievals.

Initials: _____

The other party has been informed that Safe and Sound will be present and documenting the property services through written notes, photographs, video, or other documentation.




Initials: _____

## SECTION 10 — ROLE OF SAFE AND SOUND

Safe and Sound is retained to provide neutral Monitored Property Services. Safe and Sound does not provide legal advice, legal representation, property valuation, appraisal opinions, inspection opinions, or other professional opinions outside the specific services Safe and Sound has agreed to perform. Safe and Sound is hired to document and monitor property services through videorecording, photographs, or other documentation when applicable. Safe and Sound does not assist in moving physical property.

Safe and Sound's role is limited to the scope of services identified in this Agreement.

Initials: _____

## SECTION 11 — PROPERTY CONDITION & RESPONSIBILITY

I understand that Safe and Sound is not responsible for the inherent condition, value, ownership, authenticity, functionality, or quality of property involved in a monitored service unless specifically agreed to in writing as part of the scope of services. I understand that Safe and Sound does not take ownership or custody of property unless specifically agreed to in writing.

Initials: _____

## SECTION 12 — THIRD-PARTY PARTICIPATION

No person may participate in or interfere with the service unless that person's participation has been disclosed to and approved by Safe and Sound or is otherwise authorized by the applicable court order or written agreement.

Initials: _____

## SECTION 13 — CONDUCT & COMMUNICATION

I agree to conduct myself appropriately during all Monitored Property Services. I understand that Safe and Sound personnel are responsible for maintaining a neutral and professional environment. Concerns regarding Safe and Sound personnel or performance of services should be directed to Safe and Sound's management. Disputes between parties regarding ownership, entitlement to property, legal rights, or other substantive issues should be addressed through the parties' respective legal counsel when applicable.




Initials: _____

## SECTION 14 — LIABILITY & RELEASE

I understand that there are inherent risks associated with Monitored Property Services. To the extent permitted by applicable law, I agree to release, hold harmless, and indemnify Safe and Sound and its employees, contractors, and associates from claims arising from the performance of the agreed-upon services, except to the extent caused by conduct for which such protection cannot legally apply. Safe and Sound shall not be responsible for circumstances beyond its reasonable control that prevent or interrupt the performance of services.

Initials: _____

## SECTION 15 — FEES & RETAINER

**Service Fee: $200/hr with two-hour minimum.**

**Rate is applied to initial phone calls, coordination before and after services, and travel to and from service location(s).**

**Retainer Required: After forms are completed Safe and Sound will send an invoice for estimated service cost. Additional time not used will be refunded once services are complete over the minimum of $400.**

The applicable retainer must be received 72 hours before services are performed unless otherwise agreed to in writing. The final amount charged may vary depending upon actual service time, travel, additional services requested, additional locations, or other applicable charges.

**Cancellations inside of 48 hours will not be refundable. Minimum service charge will be applied for cancellations within 48 hours.**

Any unused portion of a retainer will be handled according to Safe and Sound's applicable fee policy listed above.

Initials: _____

If additional personnel are required by Safe and Sound, an additional $200/hour, per professional will be invoiced prior to service date.

Initials: _____




## SECTION 16 — ACKNOWLEDGEMENT & CONSENT

☐ I have provided accurate information to Safe and Sound.

☐ I have identified the service(s) requested.

☐ I understand the role and limitations of Safe and Sound.

☐ I understand the documentation and monitoring procedures.

☐ I agree to comply with Safe and Sound policies and procedures.

☐ I understand the applicable fees, retainer requirements, and cancellation policy.

☐ I understand Safe and Sound is not providing legal representation or legal advice.

☐ I have had an opportunity to ask questions regarding the services.

☐ I agree to the Terms and Conditions contained in this Agreement.

**SIGNATURES**

**Retaining Party Printed Name**_____

**Signature**_____

**Date**_____

**SAFE AND SOUND**

**Representative Name**_____

**Title**_____

**Signature**_____

**Date**_____