

Seller Consultation Quick-Start Worksheet

The essential information to organize before your initial home-selling consultation.

Seller name(s)	Property address
Phone	Email
Preferred contact method	Current occupancy

WHY ARE YOU CONSIDERING SELLING?

What is creating the need or opportunity to sell?

PREFERRED TIMING AND TRANSITION

Ideal listing timeframe	Preferred closing date	Preferred possession date
Is another home purchase involved? ☐ Yes ☐ No ☐ Unsure	Is relocation involved? ☐ Yes ☐ No	Are sale proceeds needed for another purchase? ☐ Yes ☐ No ☐ Unsure

YOUR THREE MOST IMPORTANT PRIORITIES

☐ Highest possible net proceeds	☐ Fast sale	☐ Certainty of closing
☐ Flexible closing date	☐ Post-closing possession	☐ Minimal preparation work
☐ Limited repairs	☐ Minimal disruption	☐ Coordinate another purchase
☐ Avoid overlapping housing costs	☐ Privacy	☐ Other
Priority 1	Priority 2	Priority 3

Use this page to clarify why you are selling, when you hope to move, and which outcomes matter most. Leave uncertain items blank for discussion.

Property, Financial, and Consultation Priorities

Identify the essential property facts, preparation concerns, financial priorities, and questions you want answered.

FINANCIAL PLANNING

Estimated mortgage balance	Other known liens or loans	Minimum net proceeds needed
Available preparation budget	Estimated moving / transition costs	Desired net proceeds

Sale price and net proceeds are not the same. Mortgage payoff, preparation, concessions, repairs, closing expenses, and contract terms all affect the final result.

KNOWN PROPERTY CONCERNS

☐ Roof	☐ Foundation / structure	☐ Drainage / water intrusion	☐ Electrical
☐ Plumbing	☐ Heating / cooling	☐ Sewer	☐ Windows / doors
☐ Exterior condition	☐ Interior finishes	☐ Kitchen	☐ Bathrooms
☐ Flooring	☐ Landscaping	☐ Unpermitted work	☐ Incomplete projects
☐ HOA issue	☐ Title / ownership issue	☐ Insurance claim	☐ Other

Known repairs, updates, or concerns

PREPARATION AND MOVING PREFERENCES

☐ Sell substantially as-is	☐ Complete only necessary repairs	☐ Complete cosmetic preparation
☐ Consider selective renovation	☐ Prepare extensively	☐ Unsure - want guidance

Will you live in the home while it is listed?	Are pets in the home?	Would you consider moving before listing?
☐ Yes ☐ No ☐ Unsure	☐ Yes ☐ No	☐ Yes ☐ Maybe ☐ No

QUESTIONS AND TOPICS FOR THE INITIAL CONSULTATION

Primary concerns or questions I want answered	☐ Pricing and net proceeds	☐ Preparation / sell as-is
	☐ Staging and marketing	☐ Listing agreement / compensation
	☐ Offers and negotiation	☐ Inspection and appraisal
	☐ Closing / possession / moving	☐ Timeline and next steps