

THE

**HOME SELLER PACKET TEMPLATE 2022**

QUALIFY & PREPARE HOME SELLERS FOR SUCCESS



ABOUT ME

*Use this sheet of facts to see why I am the best real estate agent to represent you during your home sale.*

|  |  |  |
| --- | --- | --- |
|  | **First Last** | |
|  |  |
| Company: | [COMPANY] |
| Mobile #: | [MOBILE PHONE] |
| Office #: | [OFFICE PHONE] |
| Email: | [EMAIL ADDRESS] |
| Website: | [WEBSITE] |

With more than [# OF YEARS IN REAL ESTATE] years of real estate experience in [YOUR CITY/NEIGHBORHOOD], I have become an expert in home sales. I specialize in helping [YOUR CITY/NEIGHBORHOOD] homeowners get the maximum price within their designated sale time.

|  |  |
| --- | --- |
| **Experience** | **Education** |
|  |  |
| [# OF YEARS IN EAL ESTATE] | [EDUCATION] |
| **Designations** | **Certificates** |
|  |  |
| [DESIGNATION #1]  [DESIGNATION #2]  [DESIGNATION #3] | [CERTIFICATE #1]  [CERTIFICATE #2]  [CERTIFICATE #3] |
| **Professional Memberships** | **Achievements** |
|  |  |
| [PROFESSIONAL MEMBERSHIP #1]  [PROFESSIONAL MEMBERSHIP #2]  [PROFESSIONAL MEMBERSHIP #3] | [ACHIEVEMENT #1]  [ACHIEVEMENT #2]  [ACHIEVEMENT #3] |
|  |  |
| **Recent Stats** (2021 – Present) | **Career Stats** ([YEAR] – Present) |
|  |  |
| [# OF TRANSACTIONS]  # of Transactions | [# OF TRANSACTIONS]  # of Transactions |
| [TRANSACTIONS PER YEAR]  Transactions Per Year | [TRANSACTIONS PER YEAR]  Transactions Per Year |
| [$$$ Sales Volume]  Sales Volume | [$$$ Sales Volume]  Sales Volume |

**Recent Testimonial**

“[RECENT TESTIMONIAL]”

|  |  |  |  |
| --- | --- | --- | --- |
| **Social Media** | | | |
| Facebook: | Instagram: | Twitter: | LinkedIn: |
| [FACEBOOK.COM/] | [@INSTAGRAM] | [@TWITTER] | [LINKEDIN.COM/] |

Home Seller questionnaire

*Use this list of questions to better understand your current status, expectations, and needs as well as determine details about the property, current financing, and sale. Don’t worry if you do not have all the correct information, estimate your answers if needed.*

|  |  |  |
| --- | --- | --- |
| **Contact Information** | | |
| Name: | | Date: |
| Email: |  | Phone #: |
| Address: |  |  |

|  |  |
| --- | --- |
| **Current Status** | |
| Is your home currently on the market? If so, for how many days/months? |  |
| Are you currently working with an agent/broker? If yes, who? |  |
| Will you need to purchase a new property before selling your current property? If so, how far along is your home search? |  |
| Do you currently live on the property? |  |
| Do you plan on moving out of the home before listing or showing the property to buyers? |  |
| How quickly do you want to sell your home? |  |
| If you were to accept an offer tomorrow, how quickly could you move out and close? |  |

|  |  |
| --- | --- |
| **General** | |
| Why are you selling your home? |  |
| What is your desired move out date and why? | Date: Why?: |
| What about are you hoping to receive for the property? Explain how you came up with this price. |  |
| What’s the lowest price you’re willing to accept? |  |
| Will you need to include any contingencies in the contract? (ie: move-out contingency) |  |
| Are there any arrangements that would help you? (ie: moving, inspection, or appraisal services) |  |
| What do you like most about the home? |  |

|  |  |
| --- | --- |
| **About The Home** | |
| How large is your property? (in square feet) |  |
| How many bedrooms and bathrooms? |  |
| Does your property have a backyard? |  |
| Does your property have a garage (attached or detached) or a carport? If yes, which type and how many spots does it have? |  |
| List a few of your home’s features: |  |
| What is the age of the home? |  |
| What was the price of the home when you purchased it? (Estimate if needed) |  |
| What date did you purchase the home? |  |
| What will be included in your home sale? (ie: appliances, furniture, potted plants, etc.) |  |
| What are the ages and conditions of key components of the property? (ie: HVAC/electrical/plumbing systems, the roof, etc.) |  |
| Does your area have nuisances (ie: traffic congestion, noisy neighbors, etc.) or problematic neighbors? |  |
| Have there been any past and/or existing problems with the property? (ie: leaky roof, water damage, termite infestation, etc) If yes, explain. |  |
| Will you need to disclose any major repairs or renovations? If yes, what are they and do you have permits for them? |  |
| Will you need to make any seller disclosures? (ie: lead-based paint, natural hazards, termite problems, defects, etc.). If yes, what are they? |  |
| Has your home been inspected by a professional? If yes, can you provide the inspection report? |  |
| Has your home been appraised by a professional? If yes, can you provide the appraisal report? |  |

|  |  |
| --- | --- |
| **About Your Financing** | |
| What is the amount that you on the house? |  |
| If you have a mortgage loan, have you discussed selling the home with your lender? |  |
| Have issues, like past due payments, on your loan? |  |
| Do you have enough cash to pay for closing costs? |  |

Home Seller Checklist

*Use this checklist to guide you through the home selling process and keep track of important details.*

|  |  |  |
| --- | --- | --- |
| **Step 1:** Prepare Yourself | | |
|  | Research the home selling process | |
|  | Estimate your move-out date: |  |
|  | Research real estate agents |  |

|  |  |  |
| --- | --- | --- |
| **Step 2:** Choose a Real Estate Agent | | |
|  | Interview at least 3 real estate agents | |
|  | Evaluate your needs and goals |  |
|  | Ask for information on comparable: | |
|  | Recent sold homes |  |
|  | Recent sold homes over asking price | |
|  | Recent sold homes under asking price | |
|  | Pending homes |  |
|  | Under-contract homes |  |
|  | Average days on market |  |
|  | Discuss listing marketing plan: |  |
|  | Curb appeal & staging (optional) | |
|  | Home value booster recommendations | |
|  | Pricing strategy |  |
|  | Online/offline promotion strategy | |
|  | Marketing budget |  |
|  | Discuss closing costs, fees, etc. |  |
|  | Sign seller’s agreement |  |

|  |  |  |
| --- | --- | --- |
| **Step 3:** Work with Real Estate Agent | | |
|  | Discuss the selling process |  |
|  | Agree on marketing plan |  |
|  | Asking price: |  |
|  | Selling timeframe: |  |
|  | Contract contingencies: |  |
|  | Ideal days/times (showings): |  |
|  | Ideal days/times (open houses): |  |
|  | Discuss closing costs |  |
|  | Discuss pre-listing home inspection (optional) | |
|  | Discuss schedule home appraisal (optional) | |

|  |  |  |
| --- | --- | --- |
| **Step 4:** Prepare Home for Market | | |
|  | Declutter, clean, repair, repaint, improve home | |
|  | Complete curb appeal plan |  |
|  | Complete staging plan |  |
|  | Photograph listing |  |
|  | Agree on listing copy |  |
|  | Create other marketing/promotion content | |
|  | Complete & sign seller’s disclosure | |

|  |  |  |
| --- | --- | --- |
| **Step 5:** Find Motivated Buyers | | |
|  | Execute listing marketing plan |  |
|  | Set up lawn post |  |
|  | Add listing to MLS |  |
|  | Add listing to online platforms | |
|  | Promote listing on social media | |
|  | Complete showings | |
|  | Complete open houses |  |

|  |  |  |
| --- | --- | --- |
| **Step 6:** Manage Offers | | |
|  | Gather, review & filter offers | |
|  | Set decision-making timeframe: |  |
|  | Negotiate offers (optional) |  |

|  |  |  |
| --- | --- | --- |
| **Step 7:** Accept an Offer | | |
|  | * Offer amount: |  |
|  | * Requested move-in date: |  |
|  | * Contract contingencies |  |

|  |  |  |
| --- | --- | --- |
| **Step 8:** Complete the Closing Process | | |
|  | Complete home inspection (optional) | |
|  | Complete appraisal (optional) |  |
|  | Complete contract contingencies |  |
|  | Complete final walkthrough |  |
|  | Gather & sign all necessary closing documents: | |
|  | Mandatory seller’s disclosures | |
|  | Appliance records |  |
|  | Upgrades & additions records | |
|  | Home inspection | |
|  | Home appraisal |  |
|  | Mortgage and financing documents | |
|  | Deed to the house |  |
|  | Homeowner’s insurance records | |
|  | Original sales contract |  |
|  | Property survey |  |
|  | Property tax documentation | |
|  | Preliminary title report |  |
|  | Termite or pest inspection |  |
|  | HOA documents – if applicable | |
|  | Complete the title process |  |
|  | Pay closing costs and fees |  |

|  |  |
| --- | --- |
| **Step 9:** Move Out! | |
|  | Hand over keys & garage door open |

Prepare home for market

*Use this checklist to improve the attractiveness of your home and prepare it for market.*

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Clean/Dust/Replace (As Needed)** | | | | |  | **Store/Remove** | |
|  | Appliances |  |  | HVAC filters & vent covers |  |  | Clutter |
|  | Cabinets |  |  | Interior & exterior paint |  |  | Dirty clothes & dishes |
|  | Ceiling fans |  |  | Light bulbs |  |  | Expensive jewelry |
|  | Countertops |  |  | Light switch & outlet covers |  |  | Photographs of family |
|  | Doors & doorknobs |  |  | Mirrors |  |  | Medication |
|  | Electronics |  |  | Screen window & door |  |  | Nonessential/personal items |
|  | Fireplace & mantel |  |  | Shelves |  |  | Toys |
|  | Floors/carpet |  |  | Walls & baseboards |  |  | Trash |
|  | Furniture |  |  | Windows, blinds & sills |  |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Living Room** | |  | **Bedrooms** | |  | **Garage** | |
|  | Add decorations (optional) |  |  | Clean floors/carpet |  |  | Clean & sweep the floor |
|  | Add lighting (optional) |  |  | Clear off dressers & tables |  |  | Clean shelves |
|  | Declutter coffee & end tables |  |  | Declutter art/posters on walls |  |  | Organize storage |
|  | Declutter/organize tv stand |  |  | Declutter nightstands |  |  | Organize tools |
|  | Maximize floor space |  |  | Make the beds |  |  | Pack up nonessential items |
|  | Maximize natural light |  |  | Organize closet |  |  | Remove stains from floor |
|  | Maximize wall space |  |  | Paint, touch up & repair walls |  |  | Repaint as needed |
|  | Organize books & magazines |  |  |  |  |  |  |
|  | Organize pillows & blankets |  | **Bathrooms** | |  | **Yard** | |
|  | Reduce amount of furniture |  |  | Add a hand soup bottle |  |  | Add plants as needed |
|  |  |  |  | Clean & declutter surfaces |  |  | Clean pet waste |
| **Kitchen** | |  |  | Clean any mold/mildew |  |  | Clear window view of plants |
|  | Clean & organize refrigerator |  |  | Clean the floor |  |  | Maintain the lawn |
|  | Clean the microwave |  |  | Clean the shower curtain |  |  | Prune plants, bushes & trees |
|  | Clean the sink and faucet |  |  | Clean the sink & faucet |  |  | Remove dead plants |
|  | Clean the stove & oven |  |  | Clean the toilet |  |  | Restore lawn with mulch |
|  | Clean tile grout |  |  | Declutter shower/bath |  |  | Weed all areas |
|  | Clean/declutter countertops |  |  | Fold towels on towel rack |  |  |  |
|  | Organize pantry |  |  | Organize cabinets |  | **Exterior** | |
|  | Put away cleaning products |  |  | Replace caulk as needed |  |  | Clean & clear walkways |
|  | Put away pet items |  |  |  |  |  | Clean & organize patio |
|  | Remove refrigerator magnets |  | **Laundry Room** | |  |  | Organize patio furniture |
|  | Repair countertops |  |  | Clean & clear surfaces |  |  | Pressure wash walls/ground |
|  |  |  |  | Clean & empty washer/dryer |  |  | Repaint walls/trim as needed |
| **Dining Room** | |  |  | Clean the floor |  |  | Repaint/repair front door |
|  | Add a centerpiece |  |  | Clean under washer/dryer |  |  | Repair fence as needed |
|  | Set up/clear the dining table |  |  | Put away laundry supplies |  |  | Replace siding as needed |
|  |  |  |  | Use bright lighting |  |  | Restain/repaint the deck |
|  |  |  |  |  |  |  | Wash doors/screens |

Home Seller TERMINOLOGY

*Use this list of real estate definitions to help you understand common terms used during the home sales process.*

1. **Appraisal:** A document of opinion of property value at a specific point in time.1
2. **As-is:** A contract or offer clause stating that the seller will not repair or correct any problems with the property. Also used in listings and marketing materials. 1
3. **Backup offer:** When an offer is accepted contingent on the fall through or voiding of an accepted first offer. 1
4. **Buyer’s agent:** The agent who shows the buyer’s property, negotiates the contract, or offer, and works with the buyer to close the transaction.[1](https://magazine.realtor/tool-kit/rookie/article/2020/02/real-estate-glossary)
5. **Closing:** The end of a transaction where documents are signed, and funds are dispersed. 1
6. **Closing costs:** The fees paid at the closing of a real estate transaction. 1
7. **Comparative Market Analysis:** A study done by real estate sales agents and brokers using active, pending, and sold comparable properties to estimate a price for a property. 1
8. **Conventional sale:** When the property is owned outright and has no mortgage. 1
9. **Days on market (DOM):** The # of days a home has been listed on the market. 1
10. **Dual Agency:** The representation of opposing principals (buyers & seller) at the same time. 1
11. **Due diligence:** The process of gathering information about the condition and legal status of all the assets that will be sold. 1
12. **Earnest money deposit:** Money given to the seller at the time an offer is made as a sign of the buyer’s good faith. 1
13. **Equity:** The amount of dollars invested by a homeowner into their home. 1
14. **Escrow:** A bond, deed, or other document kept in custody of a 3rd party and taking effect when specified conditions are met. 1
15. **Home inspection:** A home inspector examines your home for integrity (HVAC system, electrical, plumbing, attic, flooring, foundation, etc. 1
16. **Listing agent:** The agent that represents the home seller during a real estate transaction. 1
17. **Listing price:** The price of a property through a listing agreement. 1
18. **Market value:** The highest price in terms of money which a property will bring in a competitive and open market under all the conditions requisite to a fair sale, the buyer and seller, each acting prudently, knowledgeably and assuming the price is not affected by undue stimulus. 1
19. **Multiple listing service (MLS):** A compilation of available properties for sale by member brokers. 1
20. **Natural hazards disclosure report:** A report that states risks of natural hazards for the property. 1
21. **Offer to purchase**: When a buyer proposes certain terms and presents these terms to the seller.
22. **Open house (public)**: A real estate contract that has been accepted on a property but the transaction has not closed. 1
23. **Pending**: A real estate contract that has been accepted on a property but the transaction has not closed. 1
24. **Pre-approval:** A higher level of buyer/borrower prequalification required by a mortgage lender. Some pre-approvals have certain conditions the borrower must meet. 1
25. **Pre-qualification:** The mortgage company tells a buyer in advance of the formal mortgage application, how much money the borrower can afford to borrow - some have conditions that the borrower must meet. 1
26. **Purchase and sale agreement:** The written contract between the buyer and seller that outlines the terms of sale. 1
27. **REALTOR©:** A registered trademark of the NATIONAL ASSOCIATION OF REALTORS - used only by its members. 1
28. **Seller concession:** Incentives to motivate buyers to purchase a home. 1
29. **Seller disclosure:** Information about the property like major renovations, water damage, pest, etc. 1
30. **Short sale:** The property is sold for less than the debt secured by the property. 1
31. **Title search:** Looks at public records of a property’s history - sales, purchases, taxes, etc. 1
32. **Under contract:** A property that has an accepted real estate contract between seller and buyer. 1

Source1: REALTOR Magazine | Real Estate Glossary https://magazine.realtor/tool-kit/rookie/article/2020/02/real-estate-glossary

Home Seller TIMLINE

*Use this general timeline to guide you through the home sales process. NOTE: The steps may vary depending on the two parties.*

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Now:** | 1. Choose an Ideal Close Date | |  | **Notes** | | | | |
|  |  |  |  |  | | | | |
| **60 Days Before Listing:** | 2. Research Your Local Market | |  |
|  |  |  |  |
| **45 Days Before Listing:** | 3. Price Your Home | |  |
|  |  |  |
| 4. Discuss Our Marketing Strategy | |  |
|  |  |  |  |  |  |  |  |
| 5. Prepare The Home for Market | |  | Staging/Curb Appeal |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| 6. Take Professional Listing Photos | |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| **30 Days Before Listing:** | 7. List The Home on the Market | |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| 8. Market the Home to Potential Buyers | |  | Open Houses/Showings |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| 9. Gather, Evaluate, Negotiate Offers | |  | Accept an Offer |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| 10. Open ESCROW | |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| 11. Collect Earnest Deposit | |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| 12. Complete Contingencies  (Under Contract) | |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| 13. Final Walk-through | |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| 14. Sign Closing Documents | |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| 15. Move Out! | |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| 16. Close ESCROW  (Closing) | |  |  |  |  |  |  |