



8 HOMEBUYER & SELLER CHECKLIST TEMPLATES



Home Buying Checklist

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

Step 1: Determine Affordability

- Price Range of Home: _____
- Target monthly mortgage: _____
- Other expenses: _____
- Household income: _____
 - Monthly income: _____
- Debt amount: _____
 - Monthly debt payment: _____
- Credit Score(s): _____
 - Credit Score Goal(s): _____
- Down payment amount: _____
 - % of Home to Save for: _____
 - Savings goal: _____
 - Savings goal date: _____

Step 2: Choose a Lender

- Lender's name: _____
- Lender's company: _____
- Gather financial documents:
 - Proof of Income
 - Proof of Assets
 - Meet credit score goal
 - Employment verification
 - Other documentation
- Submit financial documents
- Choose a Mortgage Loan: _____
 - Loan type: _____
 - Loan amount: _____
 - Monthly payment: _____
 - Payment length: _____
 - Interest rate: _____
- Get prequalified
- Get preapproved

Step 3: Choose a Real Estate Agent

- Sign buyer's agreement
 - Name: _____
 - Brokerage: _____
 - Phone #: _____

Step 4: Choose a Location

- Zip code #1: _____
- Zip code #2: _____
- Zip code #3: _____

Step 5: Find a Home (Preferences)

- # of Bedrooms: _____
- # of Bathrooms: _____
- Age of Home: _____
- Age of Electric/Plumbing: _____
- Age of Roof: _____
- Square footage: _____
- Backyard?
- Garage/carport? _____
- Other features: _____

Step 6: Visit Showings + Open Houses

Step 7: Submit Offer

- Offer amount: _____
- Escalation cap: _____
- Contingencies? _____
- Preferred Move-in Date: _____
- Terms of Contract: _____
- Get Offer Approved by Lender

Step 8: Get Offer Accepted

- Submit earnest deposit

Step 9: Complete Home Inspection

- Request repairs?
- Renegotiate offer?
- Add contingencies?

Step 10: Complete Appraisal

- Appraisal Value: _____

Step 11: Close on the Home

- Complete contingencies: _____
- Sign important documents:
 - Settlement statement
 - The deed (if paid in-full)
 - The promissory note
 - The Deed of Trust/Mortgages
- Pay Closing Cost (If needed)
- Close ESCROW

Step 12: Get Keys & Move In!



Home Selling 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



House Hunting Checklist

Use this checklist to guide you through showings and to keep track of important details of homes.

Address: _____ Asking price: _____

Neighborhood: _____ # of bedrooms: _____ # of bathrooms: _____

Year built: _____ Annual taxes: _____ HOA Fee: _____ Square feet: _____

Walk score: _____ Commute time: _____ School district: _____

Exterior



Curb appeal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Yard/landscaping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Front lawn	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Backyard	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Irrigation/sprinklers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
House type	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exterior siding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Foundation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Deck/patio	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Porch	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Garage/carport	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Windows/screens	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Window casings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doors/screens	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Door casings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Roof	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gutters/Downspout	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fencing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outdoor storage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Features

Fireplace	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chimney	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Swimming pool	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Washer/dryer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Water heater	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A/C unit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Furnace	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Energy efficiency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Home warranty	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Phone reception	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other

Offer due date: _____

Move-out date: _____

Overall score (1-10): _____

Selling as is (Y/N): _____

Reason for selling: _____

Interior



Openness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Atmosphere	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Natural light	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Floorplan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
View	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walls/trim	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Windows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Window casings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Door casings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Flooring	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stairs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Storage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Entry space	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Living room	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dining room	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Den	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kitchen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Layout	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Countertops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cabinets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sink	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Backsplash	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Flooring	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Light fixtures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pantry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Island	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outlets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Refrigerator	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stove/oven	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Microwave	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dishwasher	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Notes



Master bedroom	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bedroom #2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bedroom #3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bedroom #4	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Master bathroom	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bathroom #2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bathroom #3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Garage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Laundry room	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Home Systems

Electrical	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Plumbing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Water filtration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HVAC	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Insulation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Security	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Location

Neighborhood	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Street access	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Traffic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Noise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Schools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shopping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parks & rec	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prox. to airport	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prox. to pub trans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Property value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Mortgage Pre-approval Checklist

Use this checklist to help you gather and track documents required to get the pre-approval process started.

Lender's Name: _____ Lender's Phone #: _____
Lender's Company: _____ Lender's Email: _____

- Valid Identification**
A driver's license, state-issued ID card, passport, military ID, and any sort of government-issued ID.
- Social Security Card**
- Federal Tax Returns (Previous 2 Years)**
- State Tax Returns (Previous 2 Years)**
- W-2 Forms / 1099 / K-1 Statements (Previous 2 Years)**
- Recent Paystubs (For Previous 30 Days)**
- Assets Statement**
- Monthly Debt Payments**
- Copy of Current Mortgage Statement**
- Property Tax Statements**
- Profits and Loss Statements**



Moving Out Checklist

Use this checklist to track address changes when moving out of your home.

Change of Address

Public Institutions:

- Department of Motor Vehicles (DMV)
- Internal Revenue Service
- Voter Registration
- Social Security
- Department of Veteran Affairs (if applicable)
- U.S. Post Office
- Pet Registration

Financial Services:

- Billing/mailling address for financial institutions
- Billing/mailling address for online accounts (Amazon, Apple, Walmart, etc.)

Local Services:

- Utilities:
 - Power
 - Gas
 - Water
 - Trash
 - Sewage
 - Cable, internet & phone
- Insurances:
 - Home or renters
 - Motor vehicles
 - Pet
- Health:
 - Doctor's Office
 - Dentist
 - Optometrist
 - Physician
 - Veterinarian (if applicable)
- Lawn care services (if applicable)
- Security system services (if applicable)

Employer:

- For employee records
- For paychecks, tax forms, etc.
- For health insurance

Personal:

- Mailing subscriptions
- Pet tags
- Notify family, friends, etc.

At Old Address

New Tenants:

- Remove all food from freezer, pantry, etc.
- Double check drawers, closets, & storage places
- Remove all possessions from property
- Leave keys for new tenants & owners

Moving Schedule:

- Contact moving company
- Take time off to move if needed
- Arrange for personal transportation & boarding

At New Address

Arrival:

- Complete a walk-through
- Document any stains, damage, repairs, etc.
- Review floor plan & map out furniture
- Clean before moving in furniture - if needed

Local Services:

- Start service:
 - Power
 - Gas
 - Water
 - Trash
 - Sewage
 - Cable, internet & phone



Open House Questions Checklist

Use this checklist to ask the right questions about the home during an open house and keep track of answers.

Questions	Answers
<input type="checkbox"/> “May I see the Property Seller’s Disclosure Statement, please?” The seller’s disclosure statement gives insight into the condition of the property – including legal disclosure of water, fire, or other damage that may have been concealed by remodeling.	<hr/>
<input type="checkbox"/> “When’s the last service or inspection date for the heating/cooling system? What’s their condition?” A seller’s disclosure statement isn’t required to mention service history. A well-maintained system is checked every other month.	<hr/>
<input type="checkbox"/> “Has the seller made any home improvements to the property since they purchased it?” Asking about home improvements is a great way to get learn whether the work was done by a licensed professional, DIY, and if the home is a flipper.	<hr/>
<input type="checkbox"/> “What is the age of the roof?” A seller must disclose any damage or defects to the roof but not the gage. A roof has an estimated 20-year lifespan and can cost \$20k to replace.	<hr/>
<input type="checkbox"/> “What is the age of the electrical, plumbing, and septic system?” These systems can be very expensive to replace. It’s worth your time to have these inspected before purchasing to avoid major expenses in the future.	<hr/>
<input type="checkbox"/> “May I have the contact information for the HOA, please?” Get a copy of the HOA rules, membership information, and fees as well as your rights and responsibilities.	<hr/>
<input type="checkbox"/> “Has any flooding or water damage incidences occurred to the home?” A seller’s disclosure statement must mention water damage caused by leaks, natural disasters external water. It doesn’t have to mention water damage caused by personal error or accidents.	<hr/>
<input type="checkbox"/> “Has an inspection been recently conducted on this property? If so, may I see a copy of it, please?” A copy of the home inspection will give you insight into the condition of the home based on a licensed inspector.	<hr/>
<input type="checkbox"/> “Why is the house for sale?”	<hr/>
<input type="checkbox"/> “How long has the house been on the market?”	<hr/>
<input type="checkbox"/> “How many offers have you received?”	<hr/>
<input type="checkbox"/> “What’s included with the home sale?”	<hr/>
<input type="checkbox"/> “What’s the neighborhood like?”	<hr/>
<input type="checkbox"/> “What’s the seller’s timeline?”	<hr/>
<input type="checkbox"/> “How much do utilities cost?”	<hr/>

[First/Last name] • [Website] • [Phone #] • [Email Address]



Prepare Listing for Market Checklist

Use this checklist to guide you through preparing your home for market.

Clean/Dust/Replace (As Needed)

- Appliances
- Cabinets
- Ceiling fans
- Countertops
- Doors & doorknobs
- Electronics
- Fireplace & mantel
- Floors/carpet
- Furniture
- HVAC filters & vent covers
- Interior & exterior paint
- Light bulbs
- Light switch & outlet covers
- Mirrors
- Screen window & door
- Shelves
- Walls & baseboards
- Windows, blinds & sills

Store/Remove

- Clutter
- Dirty clothes & dishes
- Expensive jewelry
- Photographs of family
- Medication
- Nonessential/personal items
- Toys
- Trash

Living Room

- Add decorations (optional)
- Add lighting (optional)
- Declutter coffee & end tables
- Declutter/organize tv stand
- Maximize floor space
- Maximize natural light
- Maximize wall space
- Organize books & magazines
- Organize pillows & blankets
- Reduce amount of furniture

Kitchen

- Clean & organize refrigerator
- Clean the microwave
- Clean the sink and faucet
- Clean the stove & oven
- Clean tile grout
- Clean/declutter countertops
- Organize pantry
- Put away cleaning products
- Put away pet items
- Remove refrigerator magnets
- Repair countertops

Dining Room

- Add a centerpiece
- Set up/clear the dining table

Bedrooms

- Clean floors/carpet
- Clear off dressers & tables
- Declutter art/posters on walls
- Declutter nightstands
- Make the beds
- Organize closet
- Paint, touch up & repair walls

Bathrooms

- Add a hand soap bottle
- Clean & declutter surfaces
- Clean any mold/mildew
- Clean the floor
- Clean the shower curtain
- Clean the sink & faucet
- Clean the toilet
- Declutter shower/bath
- Fold towels on towel rack
- Organize cabinets
- Replace caulk as needed

Laundry Room

- Clean & clear surfaces
- Clean & empty washer/dryer
- Clean the floor
- Clean under washer/dryer
- Put away laundry supplies
- Use bright lighting

Garage

- Clean & sweep the floor
- Clean shelves
- Organize storage
- Organize tools
- Pack up nonessential items
- Remove stains from floor
- Repaint as needed

Yard

- Add plants as needed
- Clean pet waste
- Clear window view of plants
- Maintain the lawn
- Prune plants, bushes & trees
- Remove dead plants
- Restore lawn with mulch
- Weed all areas

Exterior

- Clean & clear walkways
- Clean & organize patio
- Organize patio furniture
- Pressure wash walls/ground
- Repaint walls/trim as needed
- Repaint/repair front door
- Repair fence as needed
- Replace siding as needed
- Restain/repaint the deck
- Wash doors/screens



Showing & Open House Prep Checklist

Use this checklist to keep track of important tasks for preparing for showings and open houses.

Before the Showing or Open House

- Declutter and clean the interior and exterior of the home
- Deodorize each room
- Maximize sunlight in each room
- Rearrange furniture to maximize space
- Declutter surfaces
- Repaint, touch-up, and recaulk areas if needed
- Clean toilets, shower, bath, sinks, and faucets
- Clean doors and windows
- Clean carpets, hardwood floors, tiles, and rugs
- Clean and repair walls, floorboards, and trim
- Dust everything
- Organize drawers, cupboards, cabinets, and closets
- Clean the inside and outside of appliances (refrigerator, oven, microwave, washer/dryer, etc.)
- Do and fold all laundry
- Make sure all light fixtures and light switches work properly
- Make sure all plumbing fixtures work properly
- Mow lawn, rake leaves, and trim foliage
- Pick up pet droppings
- Clean, declutter, and organize garage
- Clean, declutter, and organize attic and basement
- Clean pool, jacuzzi, and hot tub
- Store family photos, magazines, mail, and other personalized belongings
- Put expensive items and valuables in a safe

The Day of the Showing or Open House

- Double check open house times with agent to ensure you're off-site during showing
- Make sure everything is in order by walking through the interior and exterior
- Vacuum carpet and rugs if needed
- Clean up any debris from driveway, walk-ways, porches, patio, and decks
- Wash and put away dishes
- Take out trash
- Move vehicles off-site
- Close garage door
- Move pets off-site
- Turn off sprinklers
- Turn on all the indoor and outdoor lights
- Open all window curtains and blinds to increase natural light
- Set thermostat
- Use nonfloral air fresheners to add a welcoming aroma
- Leave the property and return after the open house