

# Your Home Selling Pre-Consultation Action Packet

**Please take a few minutes to complete the following pages prior to our appointment. It will allow us to have all of the pertinent facts and figures in front of us while we're discussing the marketing strategies for the sale of your home. We're focused on your needs.**

**Dan Weis Real Estate Consulting Team  
RE/MAX Unlimited Realtors**

**(513) 615-1890**

**[www.CincinnatiRealEstateGuy.com](http://www.CincinnatiRealEstateGuy.com)**

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**When packet is completed, please fax to (513) 842-8830 or e-mail to [dan@DanWeis.com](mailto:dan@DanWeis.com).**

# SELLER'S ACTION CHECKLIST

Please have the originals or copies of the following items available at our appointment:  
(check)

\_\_\_\_\_ **First Mortgage**  
Lender Name \_\_\_\_\_  
Account # \_\_\_\_\_  
Phone \_\_\_\_\_  
Approx. Balance \$ \_\_\_\_\_

\_\_\_\_\_ **Home Equity / Line of Credit / 2nd Mortgage Documents (if applicable)**  
Lender Name \_\_\_\_\_  
Account # \_\_\_\_\_  
Phone # \_\_\_\_\_  
Approx. Balance \$ \_\_\_\_\_

\_\_\_\_\_ **Latest County Tax Bill (if available)**

\_\_\_\_\_ **Deed with legal description (if available)**

\_\_\_\_\_ **Property Survey (if available)**

\_\_\_\_\_ **Most Recent Lender Appraisal (Purchase or Re-Finance)**

\_\_\_\_\_ **Restrictions/Covenants (if applicable)**

\_\_\_\_\_ **Utility Bills (last 12 months)**

\_\_\_\_\_ **Special Assessment Documents (if applicable)**

\_\_\_\_\_ **Condo/Homeowner's Association By-Laws (if applicable)**  
Monthly/Annual Amount \$ \_\_\_\_\_ Mgmt Co. \_\_\_\_\_  
Address \_\_\_\_\_  
Contact \_\_\_\_\_  
Phone \_\_\_\_\_

\_\_\_\_\_ **Spare Set of House Keys to All Exterior & Garage Doors**

\_\_\_\_\_ **List of Home Improvements/Dates Completed (within last 10 yrs)**

These items will assist us in accurately analyzing your real estate position, so we may determine what's  
in your best interests. Thank you for taking the time to gather these important items!

# What Are Your Concerns Or Questions?

Selling your home is a complex process and it's only natural to have some questions and concerns. I'll discuss any issue that's relevant about marketing and selling your property. My team of dedicated professionals and I will look out for your best interests.

## Various Topics

Showing Procedures \* Buyer Qualifications \* Advertising/Marketing Program  
Timing of the Sale \* Realtor Qualifications \* Legal Issues \* Security  
Advertising/Marketing Program \* Closing & Buyer Possession Dates \* Marketing Fee \*  
Communication \* Home Inspections \* Proper Pricing \* Negotiations \* Home Prep

Please note any questions you may have, so that we can address them during our appointment!

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_
- 5) \_\_\_\_\_
- 6) \_\_\_\_\_
- 7) \_\_\_\_\_
- 8) \_\_\_\_\_
- 9) \_\_\_\_\_
- 10) \_\_\_\_\_

What qualities are you looking for in a real estate agent?

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# Your Selling Motivation

You may have any number of personal, business and financial reasons for selling your property. The better I can understand your selling motivation, the more accurately I can work with you to determine the best strategy needed to sell. This will also help you go through the entire home selling process as smoothly and as trouble-free as possible.

Please feel free to check off as many of your current motivations as you wish. If there are any that don't appear on the list, please add them at the end. (*This information will be kept confidential at your request.*)

- \_\_\_\_\_ **Need more / less room**
- \_\_\_\_\_ **Divorce / Separation**
- \_\_\_\_\_ **Addition to your family**
- \_\_\_\_\_ **Fewer family members now living at home**
- \_\_\_\_\_ **Job promotion / relocation**
- \_\_\_\_\_ **Career adjustments (layoff, termination, reduced hours)**
- \_\_\_\_\_ **Favorable interest rates**
- \_\_\_\_\_ **Seeking different schools / neighborhood**
- \_\_\_\_\_ **Already found/bought another home**
- \_\_\_\_\_ **Tax situation**
- \_\_\_\_\_ **Want more / less land**
- \_\_\_\_\_ **Retiring out of state**
- \_\_\_\_\_ **Building a new home**
- \_\_\_\_\_ **Probate/Estate situation**
- \_\_\_\_\_ **Pre-Foreclosure**
  
- \_\_\_\_\_ **Other** \_\_\_\_\_

Thank you for taking the time to complete this questionnaire.

# Nobody Knows Your Home Like You Do!

*Please Help Us Tell Home Buyers What's Great About Your Home!*

**When you purchased your home, there were things you really loved about it. Please take a moment and list the things that most attracted you to this home:**

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**Now list the improvements you have added to your home:**

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**What features are there that a buyer may miss? List everything you can think of:**

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**What do you feel are the 3 best features of your home?**

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

**What do you consider to be the best features of your neighborhood and community?**

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Thank you for filling out this form. It will help us make sure potential buyers don't miss anything when we're helping them make a decision to purchase your property.