

DATE _____ SOURCE _____ TIMEFRAME ☐ Now ☐ 30 ☐ 60 ☐ 90

PROPERTY AND OWNERS

PROPERTY ADDRESS _____

NAME _____ PHONE _____ DATE OF BIRTH _____

EMAIL _____ BEST TIME TO REACH _____

SECOND NAME _____ PHONE _____ DATE OF BIRTH _____

EMAIL _____ PREFERRED CONTACT ☐ Call ☐ Text ☐ Email

OCCUPIED BY

☐ Owner ☐ Tenant ☐ Vacant

BEFORE THE APPOINTMENT

WHY ARE YOU SELLING _____

WHEN DO YOU NEED TO BE MOVED _____

WHERE ARE YOU MOVING TO _____

SOLD A HOME BEFORE

☐ Yes ☐ No

YEAR BOUGHT _____ PURCHASE PRICE _____ AMOUNT OWED _____ CURRENT ON PAYMENTS

☐ Yes ☐ No

MET WITH OR PLAN TO MEET OTHER AGENTS _____

PLAN TO LIST AT THE APPOINTMENT

☐ Yes ☐ No

WHAT DO YOU EXPECT FROM YOUR AGENT? _____

Ask what they owe before the appointment, not at the kitchen table. A seller who is underwater needs a different conversation, and you both want to know that in advance.

THE HOME

SQUARE FEET _____ BED / BATH _____ LOT SIZE _____ STORIES ☐ 1 ☐ 2

YEAR BUILT _____ GARAGE _____ POOL ☐ Y ☐ N RV GATE ☐ Y ☐ N

AIR CONDITIONING AGE

ROOF AGE

APPOINTMENT DATE

DESCRIBE THE HOME

UPDATES AND IMPROVEMENTS

PRE-APPOINTMENT CHECKLIST

- | | |
|---|--|
| ☐ Added to CRM | ☐ Tax record pulled |
| ☐ MLS comps and RPR | ☐ Seller net sheet prepared |
| ☐ Pre-listing book delivered | ☐ Listing paperwork ready |
| ☐ Thank-you card sent | ☐ Source thanked for the referral |

AT THE APPOINTMENT

LIST DATE

LIST PRICE

PHOTOS BOOKED

OPEN HOUSE

HOME WARRANTY

☐ Yes ☐ No

WASHER / DRYER STAY

☐ Yes ☐ No ☐ Maybe

FRIDGE STAYS

☐ Yes ☐ No ☐ Maybe

SHOWING INSTRUCTIONS

PREFERRED CLOSE DATE

KEYS RECEIVED

☐ Yes ☐ No

SENT TO TC

☐ Yes ☐ No

NOTES

