



SELLER CONSULATION FORM

Name: _____

Email: _____

Street Address: _____

City/State/Zip: _____

Main Phone: _____

- ☐ Cell
- ☐ Home
- ☐ Work

Alternate Phone: _____

- ☐ Cell
- ☐ Home
- ☐ Work

List all parties on the loan/mortgage and/or the title/deed:

Seller Questions:

1. What is the current state of your property?

- ☐ Occupied as primary residence
- ☐ Vacant
- ☐ Leased and occupied by tenants

2. When did you purchase this property?

- ☐ Within the last 5 years
- ☐ Prior 5-10 years
- ☐ Prior 10-15 years
- ☐ 15 years

3. What is your primary reason for selling/considering selling?

- ☐ Moving out of state
- ☐ Moving locally (changing neighborhoods, different space requirements, etc.)
- ☐ Financially-motivated (to reduce overhead or to profit from an investment)
- ☐ Other (please specify) _____

4. Have you ever worked with an agent before to sell a home?

- ☐ Yes, multiple times
- ☐ Yes, once
- ☐ No



5. If applicable, how was your previous experience working with an agent(s) - Please provide any constructive feedback to help our working relationship

- ☐ Positive
 - ☐ Generally Positive
 - ☐ Neutral
 - ☐ Negative
-

6. How soon would you like to list your property?

- ☐ Immediately (0-2 weeks)
- ☐ 1 month
- ☐ 2 months
- ☐ Within the year
- ☐ Other (please specify) _____

7. What is your ideal closing time frame?

- ☐ 1-2 months (as soon as possible)
- ☐ 3 months
- ☐ Quick settlement with a seller rent-back period to find new property
- ☐ Flexible
- ☐ Other (please specify) _____

8. What was the purchase price for this property? \$_____

9. Approximately how much debt is currently on this property? \$_____

10. How much do you estimate your property is currently worth?

- ☐ Less than or equal to the original purchase price
- ☐ Slightly more than original purchase price but enough to cover most closing costs
- ☐ 5-10% greater than your purchase price
- ☐ 10-15% greater than your purchase price
- ☐ 15%+
- ☐ Other/Estimated Value: \$_____

What was the most recent tax appraisal value and when was it completed?

\$_____



11. Are there any additional contingencies related to the sale of your property (check all that apply)?

- ☐ I prefer to sell this property before I purchase a new property
- ☐ I need to sell this property before I purchase a new property
- ☐ I prefer a Seller Rent-Back (e.g., up to 2-3 mo) in order to find another property
- ☐ There are some major repairs that need to occur before I put my home on the market
- ☐ The sale would be subject to third party approval (e.g., Estate Sale, Short Sale, etc.)
- ☐ Other (please specify) _____

12. Recent renovations/capital improvements (check all that apply):

- ☐ Kitchen (entire)
- ☐ Kitchen (partial)
- ☐ Master Bathroom
- ☐ Other Bathrooms
- ☐ Half Bath
- ☐ Central Air
- ☐ Central Heat
- ☐ Roof
- ☐ Plumbing
- ☐ Electrical
- ☐ Other/Further Explanations (i.e. when/warranties/other improvements):

Approximate total value of renovations/improvements: \$_____

13. In your opinion, what are the *less* desirable features to downplay when marketing your home?

- ☐ Outdated kitchen/bathrooms/etc.
- ☐ Outdated systems (HVAC, electrical, plumbing)
- ☐ Curb appeal
- ☐ Location
- ☐ Square footage - _____ sq ft
- ☐ Other (please specify) _____

14. In your opinion, what are the most desirable features to highlight when marketing your home?

- ☐ Renovated Kitchen
- ☐ Renovated Bath(s)
- ☐ Updated systems (HVAC, electrical, plumbing)
- ☐ Curb appeal
- ☐ Location

- ☐ Walking distance to metro
- ☐ Garage/driveway parking
- ☐ Historical character
- ☐ Walking distance to Metro or other amenities
- ☐ Added Square footage – Orig: _____ sq ft
 After Renovaton: _____ sq ft
- ☐ Other (please specify) _____

15. Property Specs:

- ☐ Style
 - ☐ Bungalow
 - ☐ Ranch
 - ☐ Townhouse
 - ☐ Condo
 - ☐ Craftsman
 - ☐ Other? _____
- ☐ How many bedrooms? Sq Ft _____
- ☐ How many bathrooms? Sq Ft _____
- ☐ Are any of the bathrooms en suite? How many? _____
- ☐ Laundry Room is located _____
- ☐ Open Concept Kitchen
- ☐ Living Areas – how many? located? _____
- ☐ Basement –
 - ☐ Finished - Sq Ft _____
 - ☐ Unfinished - Sq Ft _____
- ☐ Attic
 - ☐ Walk up
 - ☐ Drop down ladder
 - ☐ Finished
 - ☐ Unfinished
- ☐ Flooring? _____ Any hardwood? _____
- ☐ Garage – how many vehicles? _____
- ☐ Driveway – how many designated spaces? _____
- ☐ Street Parking
- ☐ Yard/Property Size _____

16. Any additional unique features about your home? _____

17. Would you consider investing in staging your home to increase its marketability?

- ☐ Yes
- ☐ No



18. Would you like for us to do a complimentary Portfolio Analysis of any additional properties?

- Examples include looking for areas to increase efficiencies (e.g., lowering interest rates)
- Highest-and-Best Use Analysis of your investment funds (e.g., renovations/capital improvements)
- Valuation Analysis to determine current market value

19. What is your preferred method of contact during the workday

- Email (personal)
- Email (business) _____
- Phone (cell)
- Phone (home)
- Phone (office) _____
- Text Message
- Other (please specify) _____