THE COMPLETE

LONG ISLAND SELLER TOOLKIT

Practical checklists, worksheets, planners and transaction tools to help Long Island homeowners prepare, market, negotiate and move through a home sale with greater clarity.

2026 Edition

ListingsOfLongIsland.com

Kenville Prince | Real Estate Associate Broker

Seller Toolkit Contents

Note: Resource numbering reflects the established Seller Toolkit library. Resource #14 was a later duplicate of the Seller Net Proceeds Worksheet and is intentionally not repeated in this combined edition.

HOME SELLER PREPARATION CHECKLIST

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Use this checklist before your home goes on the market. Focus first on repairs, cleanliness, decluttering, curb appeal, safety, and the small details that help buyers see the home at its best. Not every property needs every item - use the checklist to build your own plan.

PROPERTY INFORMATION

Property Address	______________________________	**Target List Date**	_____________
Seller Name(s)	______________________________	**Agent**	Kenville Prince

1. REPAIRS & MAINTENANCE

[ ]	Walk through the home and note visible repairs buyers are likely to notice.	Notes: _______________
[ ]	Repair leaking faucets, running toilets, loose handles, and obvious plumbing issues.	Notes: _______________
[ ]	Replace burned-out bulbs and repair non-working light fixtures or switches.	Notes: _______________
[ ]	Patch noticeable wall damage, nail holes, and damaged trim where appropriate.	Notes: _______________
[ ]	Repair sticking doors, loose knobs, damaged screens, and broken hardware.	Notes: _______________
[ ]	Check heating, cooling, and major systems for obvious service needs.	Notes: _______________
[ ]	Address active water intrusion, moisture, or other known material concerns.	Notes: _______________

2. DECLUTTER & DEPERSONALIZE

[ ]	Remove excess furniture so rooms feel open and easy to navigate.	Notes: _______________
[ ]	Clear kitchen and bathroom counters of unnecessary items.	Notes: _______________
[ ]	Organize closets and storage areas; buyers often look inside.	Notes: _______________
[ ]	Pack excess decor, collections, and highly personal items.	Notes: _______________
[ ]	Remove or neatly organize items stored in the basement, garage, attic, or utility areas.	Notes: _______________

3. DEEP CLEAN

[ ]	Deep-clean kitchens, bathrooms, floors, baseboards, and high-touch surfaces.	Notes: _______________
[ ]	Clean windows, mirrors, glass doors, and visible window tracks.	Notes: _______________
[ ]	Clean appliances that will remain with the home.	Notes: _______________
[ ]	Address pet odors, smoke odors, musty areas, and other noticeable smells.	Notes: _______________
[ ]	Dust light fixtures, vents, ceiling fans, and overlooked surfaces.	Notes: _______________

4. CURB APPEAL & EXTERIOR

[ ]	Mow, edge, trim, weed, and remove outdoor debris.	Notes: ____________________
[ ]	Make the front entry clean, welcoming, and easy to access.	Notes: ____________________
[ ]	Power-wash or clean visibly dirty walkways, siding, patio, deck, or fencing as appropriate.	Notes: ____________________
[ ]	Touch up peeling or visibly worn exterior paint where practical.	Notes: ____________________
[ ]	Make sure house numbers, exterior lighting, mailbox, and entry hardware are presentable.	Notes: ____________________
[ ]	Secure pools, gates, railings, steps, and other exterior safety items.	Notes: ____________________

5. KITCHEN & BATHROOM PRESENTATION

[ ]	Remove excess countertop appliances and products.	Notes: ____________________
[ ]	Organize visible pantry, cabinet, and vanity storage.	Notes: ____________________
[ ]	Replace heavily worn shower curtains, bath mats, or inexpensive presentation items if needed.	Notes: ____________________
[ ]	Refresh damaged or discolored caulk/grout where practical.	Notes: ____________________

6. LIGHTING & SHOWING READINESS

[ ]	Use consistent working bulbs and maximize natural light.	Notes: ____________________
[ ]	Open blinds or curtains for showings when appropriate.	Notes: ____________________
[ ]	Create a simple plan for pets during showings.	Notes: ____________________
[ ]	Remove valuables, medications, sensitive documents, and personally identifying information.	Notes: ____________________
[ ]	Keep walkways, entrances, and key rooms accessible for buyers.	Notes: ____________________

7. DOCUMENTS & PROPERTY INFORMATION

[ ]	Locate your most recent survey, if available.	Notes: ____________________
[ ]	Gather permits, certificates, warranties, receipts, and records for significant improvements.	Notes: ____________________
[ ]	Prepare a list of meaningful upgrades and approximate completion dates.	Notes: ____________________
[ ]	Locate mortgage/HELOC information needed for eventual payoff requests.	Notes: ____________________
[ ]	Identify any known property issues that should be discussed with your agent and attorney.	Notes: ____________________

8. FINAL PRE-LISTING CHECK

[ ]	Complete a final walkthrough from a buyer's point of view.	Notes: ____________________
[ ]	Remove trash, recycling, excess boxes, and unfinished project materials.	Notes: ____________________
[ ]	Confirm photography areas are clean, staged, and accessible.	Notes: ____________________
[ ]	Put away seasonal items that distract from the home's strongest features.	Notes: ____________________
[ ]	Confirm exterior, yard, driveway, and entry are photo-ready.	Notes: ____________________
[ ]	Review any remaining concerns with your real estate agent before launch.	Notes: ____________________

PRE-LISTING READINESS SNAPSHOT

Top 3 items to finish before photography

1. ____

2. ____

3. ____

PRE-LISTING PROPERTY REVIEW WORKSHEET

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Use this worksheet before listing to organize the facts that help tell your home's story and identify items that may need attention. Record meaningful improvements, major systems, property features, permits or certificates, warranties, and known concerns. If you are unsure about an item, note it for discussion rather than guessing.

PROPERTY PROFILE

Property Address	______________________	**Property Type**	____________
Seller Name(s)	______________________	**Year Built**	____________
Bedrooms / Baths	____________	**Approx. Sq. Ft.**	____________
Lot / School District	______________________	**Target List Date**	____________

1. MAJOR IMPROVEMENTS & UPGRADES

Item / Improvement	Year	Approx. Cost	Permit / Warranty	Notes
Kitchen renovation/update				
Bathroom renovation/update				
Roof replacement				
Windows/doors				
Siding/exterior				
Heating system				
Central air / cooling				
Electrical service/panel				
Plumbing				
Finished basement / lower level				
Addition / dormer / extension				
Pool / patio / deck / fencing				
Solar panels				
Other significant improvement				

2. MAJOR SYSTEMS & EQUIPMENT

System / Equipment	Approx. Age	Type / Fuel	Condition	Notes
Heating system				
Cooling system				
Hot water heater				
Electrical service				
Roof				
Sewer / septic / cesspool				
Well / public water				
Solar system				
Generator				
Pool equipment				
Appliances included in sale				
Other major equipment				

3. PROPERTY FEATURES & SELLING POINTS

Feature	Details / Description	Included?	Marketing Priority	Notes
Primary suite / bedroom features				
Kitchen features				
Living / entertaining spaces				
Basement / lower level				
Garage / parking				
Outdoor living areas				
Pool / recreational features				
Lot / landscaping				
Storage				
Energy-efficiency features				
Smart-home features				
Location / convenience features				
Other standout feature				

4. PERMITS, CERTIFICATES & PROPERTY RECORDS

Document / Record	Have It?	Year / Date	Follow-Up?	Notes
Current survey available				
Certificate of Occupancy / Completion documents				
Permits for additions or structural changes				
Permits/certificates for finished basement or accessory use				
Pool permit / certificate where applicable				
Deck / patio / shed / fence records where applicable				
Solar documentation				
Septic / cesspool records where applicable				
Warranties / service contracts				
Receipts / invoices for major improvements				
Other property records				

5. KNOWN REPAIRS, CONCERNS & ITEMS TO DISCUSS

Concern / Repair	Status	Approx. Date	Priority	Notes
Active or past leaks / water intrusion				
Foundation / structural concerns				
Roof concerns				
Plumbing concerns				
Electrical concerns				
Heating / cooling concerns				
Moisture / mold concerns				
Termite / pest history				
Drainage / grading concerns				
Pool / exterior safety concerns				
Open permits / unresolved municipal issues				
Known liens / title concerns to discuss with attorney				
Other known issue				

PRE-LISTING DISCUSSION NOTES

Top 3 improvements/features to emphasize in marketing:

Items that need repair, documentation, or professional follow-up before launch:

Questions for agent / attorney / other professional:

PERMIT & PROPERTY DOCUMENT CHECKLIST

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Start locating these records early. You do not need every item for every property, and this checklist does not determine whether an improvement is legally permitted or compliant. If a record is missing or a property's legal use is unclear, flag it for discussion with your real estate agent, New York real estate attorney, municipality, or other appropriate professional rather than guessing.

PROPERTY INFORMATION

Property Address	______________________________	**Target List Date**	______________
Seller Name(s)	______________________________	**Attorney**	______________
Municipality / Township	______________________________	**Agent**	Kenville Prince

1. OWNERSHIP & CORE PROPERTY RECORDS

Document / Record	Status	Where to Look	Notes / Follow-Up
Deed / ownership document	[ ] Have [ ] Need [ ] Verify [ ] N/A	Attorney / County records	Helps confirm current ownership information.
Most recent property survey, if available	[ ] Have [ ] Need [ ] Verify [ ] N/A	Seller files / Attorney	Useful for property boundaries and existing improvements.
Property tax bill / tax information	[ ] Have [ ] Need [ ] Verify [ ] N/A	Seller files / Municipality	Useful for transaction planning and property information.
Existing title policy, if available	[ ] Have [ ] Need [ ] Verify [ ] N/A	Seller files / Attorney	May contain useful prior title information.
Prior closing documents, if available	[ ] Have [ ] Need [ ] Verify [ ] N/A	Seller files / Attorney	Can help locate older property and transaction records.

2. MORTGAGE, HELOC & LIEN INFORMATION

Document / Record	Status	Where to Look	Notes / Follow-Up
Current mortgage statement	[ ] Have [ ] Need [ ] Verify [ ] N/A	Lender / Servicer	Needed to identify lender and approximate payoff balance.
Home equity loan / HELOC statement	[ ] Have [ ] Need [ ] Verify [ ] N/A	Lender / Servicer	Locate information for any additional secured financing.
Information on other known liens or judgments	[ ] Have [ ] Need [ ] Verify [ ] N/A	Seller / Attorney	Discuss known items with your attorney early.
Loan or account numbers needed for payoff requests	[ ] Have [ ] Need [ ] Verify [ ] N/A	Lender / Servicer	Keep securely; do not place sensitive account numbers on public-facing copies.
Solar financing or lien information, if applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Solar provider / Lender	Important if panels are financed or another obligation exists.

3. PERMITS, CERTIFICATES & MUNICIPAL RECORDS

Document / Record	Status	Where to Look	Notes / Follow-Up
Certificate of Occupancy (CO), where applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Municipality / Seller files	Locate available documentation; do not assume legal status from appearance alone.
Certificates of Completion / Compliance, where applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Municipality / Seller files	May document completed permitted work.
Building permits for additions, dormers or extensions	[ ] Have [ ] Need [ ] Verify [ ] N/A	Municipality / Seller files	Locate records for structural changes.
Permits / certificates for finished basement or altered living space	[ ] Have [ ] Need [ ] Verify [ ] N/A	Municipality / Seller files	Verify property-specific requirements with the municipality/attorney.
Pool permit / certificate, where applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Municipality / Seller files	Requirements vary by property and municipality.
Deck / porch / patio records, where applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Municipality / Seller files	Locate available records for improvements.
Garage conversion / accessory structure records, where applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Municipality / Seller files	Important where use or configuration changed.
Shed / fence records, where applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Municipality / Seller files	Requirements can vary by municipality and improvement.
Electrical / plumbing permits or certificates for major work, if available	[ ] Have [ ] Need [ ] Verify [ ] N/A	Municipality / Contractor	Locate records tied to significant work.
Open permit information, if known	[ ] Have [ ] Need [ ] Verify [ ] N/A	Municipality / Attorney	Discuss unresolved permits with your attorney and agent.

4. IMPROVEMENTS, WARRANTIES & SERVICE RECORDS

Document / Record	Status	Where to Look	Notes / Follow-Up
Roof invoice / warranty	[ ] Have [ ] Need [ ] Verify [ ] N/A	Contractor / Seller files	Record approximate installation date if known.
Heating / boiler / furnace records	[ ] Have [ ] Need [ ] Verify [ ] N/A	Contractor / Seller files	Include service or replacement information.
Central air / HVAC records	[ ] Have [ ] Need [ ] Verify [ ] N/A	Contractor / Seller files	Include installation and service information.
Hot water heater records	[ ] Have [ ] Need [ ] Verify [ ] N/A	Contractor / Seller files	Record approximate age or replacement date.
Window / door warranties or invoices	[ ] Have [ ] Need [ ] Verify [ ] N/A	Contractor / Seller files	Useful for transferable warranties where applicable.
Kitchen / bathroom renovation invoices	[ ] Have [ ] Need [ ] Verify [ ] N/A	Contractor / Seller files	Helps document significant improvements.
Appliance receipts / warranties for included items	[ ] Have [ ] Need [ ] Verify [ ] N/A	Retailer / Seller files	Include only items expected to remain with the property.
Waterproofing / drainage / foundation work records	[ ] Have [ ] Need [ ] Verify [ ] N/A	Contractor / Seller files	Keep documentation for significant corrective work.
Other major improvement receipts and warranties	[ ] Have [ ] Need [ ] Verify [ ] N/A	Contractor / Seller files	Use for meaningful property improvements.

5. SOLAR, SEPTIC & PROPERTY-SPECIFIC SYSTEMS

Document / Record	Status	Where to Look	Notes / Follow-Up
Solar ownership / purchase agreement, if applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Solar provider / Seller files	Clarify whether panels are owned, financed, leased or subject to another agreement.
Solar lease / PPA / financing documents, if applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Solar provider / Lender	Review transfer/payoff requirements with the appropriate professionals.
Solar installation permits / approvals, if available	[ ] Have [ ] Need [ ] Verify [ ] N/A	Municipality / Solar provider	Locate available installation records.
Septic / cesspool records, if applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Seller files / Service provider	Include service, installation or replacement records if available.
Well records / water treatment records, if applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Seller files / Service provider	Property-specific; locate relevant testing/service documentation.
Generator records / permits / warranty, if applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Contractor / Seller files	Include installation and service information.
Pool equipment / service / warranty records, if applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Pool company / Seller files	Useful for equipment and maintenance history.

6. ASSOCIATION, INSURANCE & OTHER RECORDS

Document / Record	Status	Where to Look	Notes / Follow-Up
HOA / condominium documents, if applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Association / Management	Locate current contact and governing/fee information.
Current association fee information, if applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Association / Management	Useful for transaction planning.
Homeowners insurance contact information	[ ] Have [ ] Need [ ] Verify [ ] N/A	Insurance provider	Coordinate cancellation timing only when appropriate.
Flood insurance / elevation information, if applicable and available	[ ] Have [ ] Need [ ] Verify [ ] N/A	Insurance provider / Seller files	Provide available records to appropriate professionals.
Rental / accessory-use documentation, if applicable	[ ] Have [ ] Need [ ] Verify [ ] N/A	Seller files / Municipality / Attorney	Property-specific legal-use questions should be verified.
Tenant / lease documents, if property is occupied by tenants	[ ] Have [ ] Need [ ] Verify [ ] N/A	Seller / Attorney	Discuss timing and obligations with your attorney.
Other property-specific agreements affecting the home	[ ] Have [ ] Need [ ] Verify [ ] N/A	Seller / Attorney	Examples may include service, access or property agreements.

DOCUMENT READINESS & FOLLOW-UP

Documents to request immediately:

Items requiring attorney / municipal / professional verification:

Questions to resolve before listing:

SELLER NET PROCEEDS WORKSHEET

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Use this worksheet to estimate what may remain from a sale after mortgage payoffs and anticipated seller expenses. Enter property-specific estimates where known. Actual closing figures are determined by the contract, lender payoff statements, attorneys, title/closing calculations, taxes, credits, and other transaction-specific items.

SALE & PROPERTY INFORMATION

Property Address	______________________________	**Estimated Sale Price**	$_________________
Seller Name(s)	______________________________	**Estimated Closing Date**	_________________
County	______________________________	**Property Type**	_________________
Agent	Kenville Prince	**Prepared / Updated**	_________________

1. LOAN PAYOFFS & SECURED OBLIGATIONS

Item	Estimated Amount	Include?	Notes
First mortgage payoff	$_________________	[ ] Yes [ ] No	_________________
Second mortgage / HELOC payoff	$_________________	[ ] Yes [ ] No	_________________
Solar loan / financed system payoff, if applicable	$_________________	[ ] Yes [ ] No	_________________
Known lien / secured obligation	$_________________	[ ] Yes [ ] No	_________________
Other payoff	$_________________	[ ] Yes [ ] No	_________________

2. ESTIMATED SELLER CLOSING COSTS & ADJUSTMENTS

Expense	Estimated Amount	Include?	Notes / Basis
Brokerage compensation	$________________	[ ] Yes [ ] No	________________
New York State transfer tax	$________________	[ ] Yes [ ] No	________________
Additional transfer tax / local charge, if applicable	$________________	[ ] Yes [ ] No	________________
Seller attorney fee	$________________	[ ] Yes [ ] No	________________
Recording / satisfaction / processing charges	$________________	[ ] Yes [ ] No	________________
Property tax / school tax adjustment	$________________	[ ] Yes [ ] No	________________
Water / sewer / utility adjustment, if applicable	$________________	[ ] Yes [ ] No	________________
Buyer closing credit / concession, if any	$________________	[ ] Yes [ ] No	________________
Repair / inspection credit, if any	$________________	[ ] Yes [ ] No	________________
HOA / condo fees, transfer or move charges, if applicable	$________________	[ ] Yes [ ] No	________________
Moving / clean-out / final preparation allowance	$________________	[ ] Yes [ ] No	________________
Other seller expense	$________________	[ ] Yes [ ] No	________________

3. ESTIMATED NET PROCEEDS

Estimated Sale Price	$________________
Less: Loan Payoffs	$________________
Less: Seller Costs / Adjustments	$________________
Estimated Net Before Other Adjustments	$________________
Planning Reserve / Other Adjustment	$________________
ESTIMATED NET PROCEEDS	$________________

QUICK SALE-PRICE SCENARIOS

Scenario	Sale Price	Estimated Net
Lower Scenario	$________________	$________________
Base Scenario	$________________	$________________
Higher Scenario	$________________	$________________

Important: This is a planning worksheet, not a closing statement. Tax adjustments and some charges may be credits or debits depending on timing and contract terms. Update estimates as verified figures become available, and rely on your New York real estate attorney and other closing professionals for final transaction figures.

UNDERSTANDING YOUR CMA

A Seller's Guide to Comparative Market Analysis | ListingsOfLongIsland.com | 2026 Edition

A Comparative Market Analysis (CMA) is a pricing analysis prepared by a real estate professional using relevant market data and property-specific judgment. It helps estimate a reasonable market positioning range by comparing your home with recent sales, current competition, pending activity when available, and meaningful differences between properties. A CMA is not an appraisal and it is not simply an average of nearby sale prices.

1. THE FOUR TYPES OF MARKET EVIDENCE

Concept	What It Means	Why It Matters
Recent Sold Comparables	What buyers actually paid	Usually the strongest evidence of recent market value when the properties are truly comparable.
Pending / Under-Contract Sales	Where buyers are acting now	Final price may not yet be public, but activity can reveal current demand and pricing direction.
Active Listings	Your competition	Shows what buyers can choose instead of your home. Asking price is not proof of value.
Expired / Withdrawn Listings	What the market may have rejected	Can add context about pricing, condition, presentation, or other factors that limited a sale.

2. WHAT MAKES A COMPARABLE RELEVANT?

Concept	What It Means	Why It Matters
Location	Similar neighborhood, school district, municipality, market area, setting and influences.	Micro-location can materially affect buyer demand.
Property Type & Style	Similar home type and architectural style.	Different styles may attract different buyer pools.
Size & Layout	Living area, bedrooms, baths, basement and functional layout.	Usable space and functionality matter, not just raw square footage.
Condition & Updates	Renovation quality, maintenance, kitchens, baths and systems.	Buyers react differently to turnkey homes and homes needing work.
Lot & Exterior	Lot, garage, pool, deck/patio and site improvements.	Outdoor utility and improvements can influence buyer response.
Timing	Sales close to the current market period.	Older sales may deserve less weight when conditions have changed.
Terms & Circumstances	Concessions, unusual terms or non-arm's-length circumstances.	A sale price may need context before it is treated as market evidence.

3. WHY ADJUSTMENTS ARE USED

Concept	What It Means	Why It Matters
Purpose	Account for meaningful differences between the subject and a comparable.	Helps create a more apples-to-apples comparison.
Direction	A comparable may be adjusted up or down depending on what it has versus the subject.	The adjustment is applied to the comparable, not as a renovation reimbursement.
Market-Based Judgment	Reflect how buyers tend to value a difference in that market.	Cost and market contribution are not necessarily the same.
Not Every Difference Matters	Small differences may have little measurable impact.	Avoids false precision and mechanical over-adjusting.
Range, Not False Precision	Adjusted comparables usually support a range.	A CMA should inform strategy rather than promise one exact number.

4. HOW TO READ THE FINAL CMA

Concept	What It Means	Why It Matters
Likely Market Range	The range supported by the most relevant evidence.	Provides the foundation for pricing discussion.
Recommended List Strategy	The positioning chosen to compete for buyer attention.	List price is a marketing decision within the evidence, not necessarily a prediction of final price.
Competition	Active listings buyers may compare against your home.	Your home competes in real time for attention and offers.
Market Response	Showings, inquiries, offers and feedback after launch.	New market response becomes additional evidence.
Reassessment	Review price, condition, presentation and competition if response is weak.	A strong plan includes clear checkpoints rather than waiting indefinitely.

COMMON CMA MISUNDERSTANDINGS

Misunderstanding	Better Way to Think About It
"My neighbor sold for X, so mine is worth the same."	One nearby sale is only one data point. Condition, size, layout, location, timing and terms can change the comparison.
"I spent $75,000 on improvements, so I add $75,000 to value."	Improvement cost and market contribution are not necessarily the same.
"The highest active listing proves my value."	Active listings show competition and seller expectations; sold properties show what buyers agreed to pay.
"Price high so we have room to negotiate."	Starting too far above the market can reduce buyer attention and weaken the launch.
"Online estimates already tell me the value."	Automated estimates may not fully account for condition, renovations, legal use, layout, micro-location and current competition.

QUESTIONS TO REVIEW WITH YOUR AGENT

What are the 3-5 comparables you consider most relevant, and why?

____

Which active listings are our strongest competition right now?

____

What meaningful differences between my home and the comparables require consideration?

____

What pricing range does the evidence support?

____

What list-price strategy do you recommend within that range, and why?

____

What market response would cause us to reassess the strategy?

____

SELL FIRST OR BUY FIRST?

A Long Island Move-Up & Downsizing Decision Worksheet | ListingsOfLongIsland.com | 2026 Edition

When you need to sell one home and buy another, there is rarely one correct sequence for everyone. Use this worksheet to compare selling first, buying first, or coordinating both transactions. Financing, available equity, temporary housing, market conditions, contract terms, and timing all matter.

YOUR MOVE AT A GLANCE

Current Home	____________________	**Target Purchase Area**	____________________
Estimated Home Value	$___________________	**Mortgage / HELOC**	$___________________
Target Purchase Price	$___________________	**Cash Without Sale**	$___________________
Ideal Move Date	____________________	**Need Sale Proceeds?**	Yes / No / Unsure

1. COMPARE THE THREE PATHS

Factor	Sell First	Buy First	Coordinate Both
Access to sale proceeds	Proceeds are known before purchasing.	May require reserves or ability to qualify carrying both homes.	Can work if timing and terms align.
Certainty of purchase budget	Higher after sale closes and net is known.	May depend on estimated rather than final proceeds.	Depends on how closely closings coordinate.
Temporary housing risk	Higher if replacement home is not secured.	Lower if new home closes first.	Possible if dates do not align.
Risk of carrying two homes	Low after current home closes.	Highest if current home takes longer to sell.	Possible for a short overlap.
Strength of purchase offer	May buy without a home-sale dependency after closing.	Can be strong if financing does not depend on current sale.	Depends on contingencies and structure.
Pressure choosing next home	May increase after selling.	Can allow more time before moving.	Timing can still create pressure.
Pressure selling current home	Can focus on sale first.	May rise if carrying costs create urgency.	Both transactions require coordination.
Moving convenience	May require two moves or storage.	Often permits a more direct move.	Can permit direct move if dates align.
Financing complexity	Usually simpler after proceeds are available.	Can be more complex; lender qualification is critical.	Requires lender and attorney coordination.
Timing flexibility	Seller may negotiate transaction-specific timing terms.	May have flexibility if replacement home is already owned.	Depends heavily on both contracts.

2. FINANCIAL & TIMING READINESS

Question	Answer	Why It Matters	Who to Ask
Can I qualify for the next mortgage before selling my current home?	[ ] Yes [ ] No [ ] Unsure	Determines whether buying first is financially realistic.	Mortgage lender
Do I need equity from my current home for the next down payment or closing costs?	[ ] Yes [ ] No [ ] Unsure	Affects whether the sale must occur first or be closely coordinated.	Lender / financial professional
Could I comfortably carry both homes for a period if needed?	[ ] Yes [ ] No [ ] Unsure	Tests the financial risk of an overlap.	Financial professional
Do I have funds for temporary housing, storage, or two moves if I sell first?	[ ] Yes [ ] No [ ] Unsure	Tests the practical cost of selling first.	Seller / agent
Would my purchase offer need a home-sale contingency?	[ ] Yes [ ] No [ ] Unsure	Can affect offer structure and competitiveness.	Agent / attorney
Can the sale and purchase closing dates realistically be coordinated?	[ ] Yes [ ] No [ ] Unsure	New York contract and closing logistics require attorney coordination.	Agent / attorney
Have I discussed occupancy or post-closing arrangements with my attorney if needed?	[ ] Yes [ ] No [ ] Unsure	Any such arrangement should be documented and transaction-specific.	Attorney
Do I understand the estimated net proceeds from my current sale?	[ ] Yes [ ] No [ ] Unsure	Provides a more realistic purchase budget.	Agent / attorney

3. MY CURRENT BEST-FIT STRATEGY

Current Lean	[ ] Sell First [ ] Buy First [ ] Coordinate Both [ ] Need More Information
Confidence	[ ] High [ ] Medium [ ] Low

What must be true financially for this strategy to work?

____

What timing or housing problem do we need to solve?

____

What should I confirm with my lender?

____

What should I review with my New York real estate attorney?

____

What is the next decision or action?

____

OFFER COMPARISON WORKSHEET

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The highest price is not always the strongest offer. Compare price, financing, contingencies, inspection and appraisal terms, credits, closing timing, and other material terms side by side. All legal and contract questions should be reviewed with the seller's New York real estate attorney.

1. SIDE-BY-SIDE OFFER TERMS

Term / Factor	Offer 1	Offer 2	Offer 3	Offer 4	What to Consider
Offer Price					Price matters, but it should be evaluated together with financing, contingencies, credits, and closing terms.
Financing Type					Cash, conventional, FHA, VA, or other financing can involve different documentation and transaction considerations.
Down Payment					A larger down payment can be one indicator of financial capacity, but it does not guarantee closing.
Contract Deposit					In New York, the contract deposit is generally addressed when contracts are signed; review amount and timing with the attorney.
Pre-Approval / Proof of Funds					Helps evaluate whether the buyer has documented financial capacity for the proposed structure.
Buyer-Agent Compensation Requested					If included as an offer term, account for its effect on estimated seller proceeds.
Seller Credit / Concession Requested					Reduces seller proceeds and may be subject to lender/program limits.
Inspection Terms					Compare timing, scope, and any limitations or waivers stated in the offer.
Financing Contingency					Review the buyer's financing terms and contingency structure with the attorney.
Appraisal Terms					Appraisal-related language can change the seller's exposure if the appraised value is below the contract price.
Home-Sale Contingency					A buyer's need to sell another property can add timing and performance risk.
Proposed Closing Date					Compare the buyer's timing with the seller's preferred move and transaction needs.
Closing-Date Flexibility					Flexibility may be valuable when the seller is coordinating another purchase or move.
Included / Excluded Items					Confirm personal property, fixtures, appliances, and exclusions are understood.
Other Special Terms					Review occupancy requests, credits, repairs, contingencies, or other non-standard terms with the attorney.

2. INDICATIVE OFFER-SPECIFIC NET COMPARISON

Calculation	Offer 1	Offer 2	Offer 3	Offer 4	Notes
Offer Price	$______________	$______________	$______________	$______________	
Estimated Seller-Paid Buyer-Agent Compensation	$______________	$______________	$______________	$______________	
Estimated Seller Credit / Concession	$______________	$______________	$______________	$______________	
Other Estimated Offer-Specific Seller Cost	$______________	$______________	$______________	$______________	
Indicative Net Before Standard Seller Closing Costs	$______________	$______________	$______________	$______________	Excludes normal seller closing costs/payoffs.

3. OFFER STRENGTH REVIEW

Review Item	Offer 1	Offer 2	Offer 3	Offer 4	What to Consider
Financial Documentation	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Is the pre-approval/proof of funds current and consistent with the offer?
Financing Complexity	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Are there financing conditions or dependencies that deserve closer review?
Contingency Exposure	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	How much uncertainty do financing, appraisal, home-sale, or other contingencies create?
Inspection Exposure	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	What does the offer actually say about inspection timing and rights?
Timing Fit	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	How well does the proposed closing timeline fit the seller's plans?
Estimated Net	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	After offer-specific credits/compensation/costs, how does the economic result compare?
Overall Fit	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Strong Moderate Weak Needs Review	Considering all material terms, how well does the offer meet the seller's priorities?

4. SELLER DECISION NOTES

Offer currently preferred:

____

Why this offer best fits the seller's priorities:

____

Terms to counter or clarify:

____

Questions for the lender / buyer's agent:

____

Questions for the seller's attorney:

____

HOME SHOWING PREPARATION CHECKLIST

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A showing-ready home does not need to feel staged to perfection. The goal is to make it easy for buyers to focus on the property: clean, bright, comfortable, accessible, and free of unnecessary distractions. Use this checklist for scheduled showings and keep your routine simple enough to repeat.

SHOWING INFORMATION

Property Address	______________________________	**Showing Date**	____________________
Pet Plan	______________________________	**Showing Window**	____________________

THE DAY BEFORE

Done	Task	Notes
[ ]	Clear kitchen and bathroom counters of unnecessary items.	
[ ]	Put away excess toys, laundry, paperwork, mail, and personal clutter.	
[ ]	Vacuum, sweep, and mop high-traffic areas.	
[ ]	Clean sinks, faucets, mirrors, toilets, and shower/tub surfaces.	
[ ]	Make beds and straighten bedrooms.	
[ ]	Empty visible trash and recycling containers.	
[ ]	Remove strong cooking, smoke, pet, or artificial fragrance odors.	
[ ]	Check that exterior entry, walkway, porch, and front door are neat.	
[ ]	Secure medications, jewelry, financial documents, keys, firearms, and other valuables.	
[ ]	Confirm the plan for pets during showings.	

THE MORNING OF SHOWINGS

Done	Task	Notes
[ ]	Open blinds or curtains where appropriate to bring in natural light.	
[ ]	Turn on appropriate interior lights, especially in darker rooms.	
[ ]	Set a comfortable indoor temperature.	
[ ]	Wipe kitchen and bathroom surfaces after morning use.	
[ ]	Put dishes away and leave the sink empty.	
[ ]	Place toiletries, laundry, and personal items out of sight.	
[ ]	Straighten pillows, throws, chairs, and bedding.	
[ ]	Check floors for last-minute debris, pet hair, or footprints.	
[ ]	Make sure outdoor areas buyers may view are reasonably accessible and presentable.	
[ ]	Confirm pets are secured or removed according to the showing plan.	

30 MINUTES BEFORE

Done	Task	Notes
[ ]	Do one quick walk-through from the front door as if you were the buyer.	
[ ]	Turn on lights in rooms that need them.	
[ ]	Open interior doors to rooms buyers should see.	
[ ]	Close toilet lids and check bathrooms one final time.	
[ ]	Remove last-minute food, dishes, cups, and trash.	
[ ]	Put away laptops, tablets, mail, documents, and other private information.	
[ ]	Check that valuables and medications are secured.	
[ ]	Remove or secure pets and pet supplies as planned.	
[ ]	Make sure keys, remotes, access devices, and seller-only documents are not left unsecured.	
[ ]	Leave the home before the scheduled showing unless your agent has advised otherwise.	

PETS, PRIVACY & SECURITY

Done	Task	Notes
[ ]	Do not assume a buyer or agent will be comfortable around a pet; follow the agreed pet plan.	
[ ]	Secure prescription medications and sensitive medical items.	
[ ]	Secure checkbooks, credit cards, passports, financial statements, tax records, and identifying documents.	
[ ]	Secure jewelry, collectibles, cash, small electronics, and other portable valuables.	
[ ]	Lock away firearms, weapons, and hazardous materials.	
[ ]	Remove visible calendars or notes containing private schedules, passwords, codes, or personal information.	
[ ]	Do not leave confidential transaction paperwork or offer information visible.	
[ ]	Tell your agent about cameras, alarms, smart locks, gate codes, or unusual access instructions.	
[ ]	Follow applicable laws and professional guidance regarding recording devices and audio/video surveillance.	

DURING THE SHOWING

Done	Task	Notes
[ ]	Give buyers reasonable space to view the property without the seller present whenever practical.	
[ ]	Do not contact or question buyers directly about their interest, finances, family, background, or plans.	
[ ]	Route questions and feedback through the real estate professionals.	
[ ]	Avoid monitoring a showing in a way that could make visitors uncomfortable.	
[ ]	Keep showing instructions consistent with the agreed listing plan.	

POST-SHOWING RESET

Done	Task	Notes
[ ]	Return lights, blinds, thermostat, and doors to the preferred settings.	
[ ]	Confirm exterior doors and accessible windows are secure.	
[ ]	Return pets to their normal areas when safe to do so.	
[ ]	Reset pillows, chairs, rugs, and other items that may have been moved.	
[ ]	Check for any obvious issue or damage and notify your agent promptly if something is wrong.	
[ ]	Restock or reset the home so it is ready for the next showing.	
[ ]	Record any seller observations or questions for your agent rather than contacting the buyer directly.	

QUICK 5-MINUTE EXIT CHECK

[ ] Lights set	[ ] Counters clear	[ ] Toilets closed	[ ] Valuables secured	[ ] Pets handled	[ ] Seller has left

Seller notes / items to discuss with agent:

HOME INSPECTION PREPARATION CHECKLIST

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Once an offer is accepted, the buyer will typically conduct the agreed inspection before contracts are fully executed. The seller's job is not to make the home 'perfect' or hide defects. The goal is to provide reasonable access, keep the property safe and functional for inspection, and handle any resulting requests through the proper transaction process.

INSPECTION INFORMATION

Property Address	____________________	**Inspection Date**	____________________
Inspection Time	____________________	**Pet / Access Plan**	____________________

BEFORE THE INSPECTION

Done	Task	Notes
[ ]	Confirm the inspection appointment and expected access instructions with your agent.	
[ ]	Plan to be away from the property during the inspection unless your agent or attorney advises otherwise.	
[ ]	Make sure utilities that normally serve the property are on and accessible, unless there is a safety reason they should not be.	
[ ]	Replace ordinary burned-out light bulbs so inspectors can distinguish a failed bulb from a possible electrical issue.	
[ ]	Clear reasonable access to the electrical panel, boiler/furnace, water heater, HVAC equipment, attic access, crawlspace, basement areas, and other major systems.	
[ ]	Remove storage or personal items blocking sinks, plumbing shutoffs, mechanical equipment, windows, doors, or visible foundation areas.	
[ ]	Secure valuables, medications, financial documents, keys, firearms, and other sensitive items.	
[ ]	Arrange for pets to be safely removed or secured according to the agreed plan.	
[ ]	Gather available records for significant permitted improvements, major system replacements, warranties, or service history that your agent/attorney recommends making available.	
[ ]	Tell your agent about known access limitations, shut-off issues, alarm systems, locked areas, or other conditions the inspector should know about.	

QUICK PROPERTY CHECK

Done	Task	Notes
[ ]	Check for active leaks or dripping fixtures you already know how to address safely.	
[ ]	Make sure sinks, tubs, showers, and toilets are reasonably clean and accessible for testing.	
[ ]	Check that doors and windows intended for normal use are not blocked by furniture or stored items.	
[ ]	Clear leaves, debris, or stored items from areas that reasonably need visual access, including around exterior mechanical equipment.	
[ ]	Make sure attic, basement, garage, and utility areas have safe, unobstructed access where practical.	
[ ]	Do not conceal stains, defects, moisture, damage, or other known conditions.	
[ ]	Do not make rushed cosmetic repairs intended to hide a problem; discuss material concerns with your agent and attorney.	
[ ]	Use licensed or appropriately qualified professionals for repairs that are outside ordinary homeowner maintenance.	

DOCUMENTS & INFORMATION TO LOCATE

Done	Task	Notes
[ ]	Recent major-system service records, if available.	
[ ]	Receipts or warranties for roof, HVAC, boiler/furnace, water heater, windows, appliances, solar equipment, or other major improvements, if available.	
[ ]	Permits, certificates, approvals, or municipal documents already in your possession for additions or alterations, if applicable.	
[ ]	Information about septic, cesspool, sewer, well, oil tank, propane, pool, generator, solar, or other property-specific systems, if applicable.	
[ ]	Instructions or access information for equipment that may not be obvious to operate.	
[ ]	Any disclosure forms or property-condition information required or recommended for the transaction should be handled through your agent and attorney.	

DURING THE INSPECTION

Done	Task	Notes
[ ]	Allow the inspector and buyer reasonable space to perform the inspection.	
[ ]	Avoid following the inspector from room to room or debating observations during the appointment.	
[ ]	Do not negotiate repairs or credits directly with the buyer during the inspection.	
[ ]	Route questions, requests, and follow-up through the real estate professionals and attorneys as appropriate.	
[ ]	Remember that an inspector may identify items that are maintenance issues, safety concerns, defects, age-related observations, or recommendations for further evaluation; not every observation automatically becomes a seller obligation.	

AFTER THE INSPECTION

Done	Task	Notes
[ ]	Wait for any buyer request or communication to come through the appropriate transaction channels.	
[ ]	Review any inspection-related request carefully with your agent and New York real estate attorney before agreeing to repairs, credits, price changes, or other terms.	
[ ]	Separate material concerns from ordinary maintenance and cosmetic preferences when evaluating a request.	
[ ]	If further evaluation is appropriate, consider obtaining input or estimates from a qualified contractor or specialist.	
[ ]	Do not begin negotiated repairs until the scope, responsibility, timing, documentation, and any required permits are understood.	
[ ]	Keep invoices, receipts, permits, photos, and completion documentation for any work performed.	
[ ]	Confirm through the attorneys when inspection-related terms are resolved and the transaction is ready for the next contractual step.	

IMPORTANT: PRE-CONTRACT INSPECTION IN NEW YORK

In a typical Long Island resale transaction, the buyer's inspection occurs after the offer is accepted but before both parties have fully executed the contract. Inspection findings may affect whether the parties agree on final terms before contract signing. Once a matter becomes contractual or legal, rely on the attorneys for guidance.

SELLER NOTES / ITEMS TO DISCUSS

APPRAISAL PREPARATION CHECKLIST

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In a typical financed Long Island resale, the lender's appraisal is ordered after the buyer and seller are in full contract. The purpose is to provide the lender with an independent opinion of value and property information for the loan process. Your goal as the seller is to provide reasonable access and accurate information - not to 'sell' the appraiser on a number.

APPRAISAL INFORMATION

Property Address	____________________	**Appraisal Date**	________________
Contract Price	$____________________	**Appraisal Time**	________________

BEFORE THE APPRAISAL

Done	Task	Notes
[ ]	Confirm the appraisal appointment and access instructions with your agent.	
[ ]	Make sure the appraiser can reasonably access all areas that are part of the property, including basement, attic access, garage, accessory areas, and exterior improvements where applicable.	
[ ]	Keep utilities and major systems operating normally unless there is a safety reason not to.	
[ ]	Complete ordinary housekeeping and basic maintenance so the appraiser can easily observe the home's condition and features.	
[ ]	Replace ordinary burned-out light bulbs and address simple maintenance items you already planned to handle.	
[ ]	Secure pets, valuables, medications, documents, and other sensitive items.	
[ ]	Tell your agent about locked areas, alarm systems, unusual access, or property features that may not be obvious.	

PROPERTY INFORMATION TO PREPARE

Done	Task	Notes
[ ]	Create a concise list of significant improvements and approximate completion dates.	
[ ]	Gather available permits, certificates, warranties, receipts, or records for major improvements when relevant and appropriate.	
[ ]	Identify major system updates such as roof, HVAC, boiler/furnace, water heater, electrical, plumbing, windows, solar, generator, septic/cesspool, pool, or other material features.	
[ ]	Confirm basic property facts such as bedroom/bath count, finished areas, garage, basement, lot features, and major amenities.	
[ ]	Tell your agent about renovations or additions that may require clarification regarding permits, certificates, or legal use.	
[ ]	Provide information factually; do not overstate square footage, room count, condition, legality, or improvement value.	

IMPROVEMENT SUMMARY

Improvement	Approx. Year	Details / Scope	Docs?
Kitchen renovation / updates			[ ]
Bathroom renovation / updates			[ ]
Roof			[ ]
Heating / cooling systems			[ ]
Windows / doors			[ ]
Electrical / plumbing			[ ]
Basement / finished space			[ ]
Exterior / siding / masonry			[ ]
Pool / patio / deck / fencing			[ ]
Solar / generator / energy improvements			[ ]
Other significant improvement			[ ]

DURING THE APPRAISAL

Done	Task	Notes
[ ]	Give the appraiser reasonable space to inspect and measure the property.	
[ ]	Allow your agent to handle relevant property information and market context when appropriate.	
[ ]	Do not pressure the appraiser to reach a particular value.	
[ ]	Do not argue about comparable sales or attempt to negotiate the contract price with the appraiser.	
[ ]	Answer factual property questions accurately if asked.	
[ ]	Remember that the appraiser is engaged for the lender's appraisal process and independently develops the appraisal opinion.	

AFTER THE APPRAISAL

Done	Task	Notes
[ ]	The seller may not immediately receive the appraisal value or report; communication typically moves through the buyer's lender and transaction parties.	
[ ]	If the appraisal supports the transaction, the loan process generally continues subject to the lender's remaining requirements.	
[ ]	If an appraisal issue arises, review the contract's appraisal-related terms and available options with your agent and New York real estate attorney.	
[ ]	If factual errors or potentially relevant comparable information need to be raised, follow the lender/appraiser's permitted reconsideration process rather than contacting the appraiser improperly.	
[ ]	Do not assume a low appraisal automatically ends the transaction; the outcome depends on the contract, financing, buyer/seller decisions, and any negotiated resolution.	

IMPORTANT: APPRAISAL VS. CMA

A CMA is a real estate professional's market analysis used to help guide pricing and strategy. An appraisal is an independent valuation performed by a licensed or certified appraiser, commonly for a lender after the property is in contract. The two may use overlapping market evidence but serve different purposes.

Seller / agent notes:

SELLER CLOSING PREPARATION CHECKLIST

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Once the buyer and seller are in full contract, the transaction moves through financing, title, appraisal when applicable, contract obligations, final walkthrough, and closing. Use this checklist to stay organized, protect the condition of the property, prepare for move-out, and coordinate closely with your agent and New York real estate attorney.

CLOSING INFORMATION

Property Address	______________________________	**Expected Closing**	________________________
Seller Attorney	______________________________	**Final Walkthrough**	________________________

FROM FULL CONTRACT TO CLOSING

Done	Task	Notes
[ ]	Keep your agent and attorney informed of any change that could affect timing, occupancy, access, or the property's condition.	
[ ]	Complete any seller obligations agreed to in the contract or later written agreements by the required time.	
[ ]	Keep the property reasonably maintained until closing and promptly report significant new damage or system failures.	
[ ]	Maintain required utilities and services through the appropriate transfer or closing date unless your attorney instructs otherwise.	
[ ]	Respond promptly to requests from your attorney for payoff information, title items, identification, documents, or signatures.	
[ ]	Coordinate any remaining lender appraisal access or follow-up access through your agent.	
[ ]	Do not remove fixtures or items that are included in the sale.	
[ ]	Confirm with your attorney before making any unusual change to the property or agreed inclusions before closing.	

DOCUMENTS & FINANCIAL ITEMS

Done	Task	Notes
[ ]	Provide your attorney with current mortgage and HELOC information needed to obtain payoff statements.	
[ ]	Address any title, lien, judgment, estate, divorce, trust, corporate, probate, or ownership documentation requested by your attorney.	
[ ]	Locate government-issued identification and any documents your attorney tells you to bring or sign.	
[ ]	Confirm how sale proceeds will be delivered and independently verify wire instructions using a trusted phone number before sending or relying on wiring information.	
[ ]	Review your estimated seller closing figures and anticipated net proceeds with your attorney.	
[ ]	Keep receipts, permits, invoices, warranties, and proof of completion for any agreed work.	
[ ]	Ask your attorney about property-tax, fuel, HOA/condo, water, or other adjustments that may apply to your transaction.	

MOVE-OUT & PROPERTY PREPARATION

Done	Task	Notes
[ ]	Confirm the contract requirements for possession, vacancy, cleanliness, and personal property.	
[ ]	Remove personal belongings and unwanted items by the required time unless something is specifically included or otherwise agreed in writing.	
[ ]	Do not leave paint, chemicals, construction debris, furniture, or trash unless the buyer has agreed in writing.	
[ ]	Leave fixtures, appliances, remotes, keys, manuals, and other included items at the property as directed.	
[ ]	Complete ordinary cleaning so the property is left in the condition required by the contract.	
[ ]	Arrange movers, storage, utility transfers, mail forwarding, and address changes around the expected closing schedule.	
[ ]	Photograph the property's general condition after move-out for your records.	
[ ]	Do not cancel homeowners insurance prematurely; confirm timing with your attorney and insurance professional.	

FINAL WALKTHROUGH PREPARATION

Done	Task	Notes
[ ]	Understand that the buyer's final walkthrough is generally a verification of property condition and agreed items, not a new home inspection.	
[ ]	Make sure agreed repairs or work are completed and supporting documentation is available when appropriate.	
[ ]	Confirm included appliances, fixtures, systems, and agreed personal property remain at the property.	
[ ]	Make sure the home is accessible and utilities needed to verify systems remain available as required.	
[ ]	Remove seller belongings and debris according to the contract.	
[ ]	Leave keys, garage remotes, alarm/access information, manuals, and other agreed items as directed by your agent or attorney.	
[ ]	Notify your agent immediately if a new issue occurs before walkthrough or closing.	

CLOSING DAY

Done	Task	Notes
[ ]	Confirm the closing date, time, location, and whether your attendance is required with your attorney.	
[ ]	Bring the identification and documents requested by your attorney.	
[ ]	Do not rely on last-minute emailed wire instructions without independently verifying them through a trusted contact method.	
[ ]	Review the final seller closing statement and ask your attorney about any figure you do not understand before signing.	
[ ]	Sign seller documents as directed by your attorney.	
[ ]	Confirm delivery of keys, possession, and any post-closing obligations through the attorneys and agents.	
[ ]	Keep copies of the final closing statement and other important closing records for your files and tax professional.	

AFTER CLOSING

Done	Task	Notes
[ ]	Confirm proceeds have been received through the method arranged with your attorney.	
[ ]	Retain your closing statement, contract, improvement records, and relevant sale documents.	
[ ]	Follow through on any written post-closing obligations.	
[ ]	Confirm utilities and services are transferred or discontinued at the appropriate time.	
[ ]	Update your mailing address and important accounts if not already completed.	
[ ]	Provide sale documents to your tax professional when preparing the applicable tax return.	

CLOSING WEEK QUICK CHECK

[ ] Move-out complete or on schedule	[ ] Agreed repairs complete	[ ] Utilities remain available as required	[ ] Keys/remotes/included items ready	[ ] Walkthrough access confirmed	[ ] Closing details confirmed

Questions / items to confirm with attorney:

MOVING PLANNER & COUNTDOWN CHECKLIST

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A smooth move starts before moving day. Use this countdown to organize packing, movers, utilities, address changes, valuables, final walkthrough preparation, and move-out responsibilities. Because New York closing dates can shift, confirm timing with your attorney and agent before making non-refundable commitments.

MOVE INFORMATION

Current Address	______________________	**New Address**	______________________
Expected Closing	______________________	**Planned Move Date**	______________________
Moving Company	______________________	**Phone**	______________________

6–8 WEEKS BEFORE THE MOVE

Done	Task	Notes / Date
[ ]	Confirm the expected closing and move-out timeline with your agent and attorney before making non-refundable arrangements.	
[ ]	Decide whether you will hire movers, rent a truck, use portable storage, or handle the move yourself.	
[ ]	Request written estimates from moving companies and confirm what services, insurance/valuation coverage, and fees are included.	
[ ]	Begin sorting belongings into keep, donate, sell, recycle, and discard categories.	
[ ]	Identify furniture or large items that will not be moving with you.	
[ ]	Create a moving folder for estimates, receipts, contracts, inventory lists, and important contact information.	
[ ]	Start gathering boxes, tape, labels, markers, protective wrap, and other packing supplies.	
[ ]	Make a list of valuables, important documents, medications, and irreplaceable items that should travel with you personally.	

4 WEEKS BEFORE

Done	Task	Notes / Date
[ ]	Book movers or reserve your truck/storage solution once your timing is sufficiently reliable.	
[ ]	Begin packing seasonal, decorative, rarely used, and non-essential items.	
[ ]	Label boxes by destination room and general contents.	
[ ]	Create a separate 'Do Not Pack' area for closing documents, identification, medications, keys, chargers, valuables, and moving-day essentials.	
[ ]	Arrange donation pickups or disposal of items that will not be moved.	
[ ]	Measure large furniture and confirm it will fit through doorways, stairs, elevators, or the new home's intended space.	
[ ]	Notify schools, service providers, subscriptions, and other organizations of your move as appropriate.	
[ ]	Review the property's contract terms so you know which fixtures, appliances, and other items must remain.	

2 WEEKS BEFORE

Done	Task	Notes / Date
[ ]	Confirm moving arrangements, arrival window, addresses, contact numbers, and payment requirements.	
[ ]	Continue packing, leaving only everyday essentials accessible.	
[ ]	Submit mail forwarding/address-change requests at the appropriate time.	
[ ]	Begin updating your address with banks, credit cards, insurance, employers, licenses, memberships, and important accounts.	
[ ]	Coordinate utility transfer or shutoff dates so required services remain available through closing/final walkthrough.	
[ ]	Plan for children and pets on moving day.	
[ ]	Use, donate, or safely dispose of items movers may not transport, such as certain chemicals, fuels, aerosols, or hazardous materials.	
[ ]	Confirm storage access if there will be a gap between sale and purchase.	

1 WEEK BEFORE

Done	Task	Notes / Date
[ ]	Confirm the latest closing and walkthrough schedule with your agent and attorney.	
[ ]	Finish most packing and clearly label fragile or high-priority boxes.	
[ ]	Pack a first-night box with toiletries, clothing, bedding, towels, basic tools, paper goods, chargers, and essential kitchen items.	
[ ]	Set aside keys, remotes, manuals, warranties, and agreed items that must remain for the buyer.	
[ ]	Back up important computer files and secure devices for transport.	
[ ]	Confirm elevator, parking, building, or access reservations at either property if applicable.	
[ ]	Plan how you will transport cash, jewelry, documents, medications, electronics, and other valuables personally.	
[ ]	Review mover payment requirements and avoid carrying unnecessary cash.	

THE DAY BEFORE

Done	Task	Notes / Date
[ ]	Finish packing except for your moving-day essentials.	
[ ]	Defrost and prepare appliances only if they are moving with you and manufacturer instructions require it.	
[ ]	Remove remaining trash and unwanted items.	
[ ]	Photograph valuable items and the general condition of the home for your records.	
[ ]	Charge phones and portable batteries.	
[ ]	Confirm movers, truck, helpers, childcare/pet care, and access one final time.	
[ ]	Keep identification, attorney information, closing documents, keys, medications, and valuables with you—not in the moving truck.	
[ ]	Get adequate rest and keep the next day's schedule accessible.	

MOVING DAY

Done	Task	Notes / Date
[ ]	Do a walkthrough before movers leave to identify items requiring special handling.	
[ ]	Keep your phone available for your agent, attorney, movers, and other essential contacts.	
[ ]	Protect floors, walls, and doorways where practical during move-out.	
[ ]	Check closets, cabinets, attic, basement, garage, shed, and outdoor storage before leaving.	
[ ]	Remove all seller belongings and debris required to be removed under the contract.	
[ ]	Leave included fixtures, appliances, keys, remotes, manuals, and agreed property at the home.	
[ ]	Do not shut off utilities needed for the buyer's final walkthrough or closing unless instructed.	
[ ]	Take final photos of the home's condition after move-out.	
[ ]	Lock and secure the property according to the agreed access plan.	
[ ]	Confirm final key/possession instructions with your agent or attorney.	

AFTER THE MOVE / AFTER CLOSING

Done	Task	Notes / Date
[ ]	Confirm movers delivered all items and promptly document any damage or missing property.	
[ ]	Unpack your first-night essentials before tackling non-essential boxes.	
[ ]	Update any remaining address records and recurring deliveries.	
[ ]	Confirm utilities and services at the former property were transferred or discontinued at the correct time.	
[ ]	Keep moving receipts and closing records for your files and tax professional.	
[ ]	Return rented equipment and retrieve deposits where applicable.	
[ ]	Update driver's license, vehicle registration, voter registration, and other official records as applicable.	
[ ]	Keep your former property documents and final closing statement in a secure long-term file.	

MOVING-DAY ESSENTIALS — KEEP WITH YOU

[ ] Photo ID	[ ] Closing / attorney info	[ ] Medications	[ ] Phone + chargers	[ ] Keys	[ ] Valuables / documents

Notes / contacts:

UTILITY TRANSFER & ADDRESS CHANGE CHECKLIST

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Use this checklist to coordinate utility service, mail forwarding, account updates, and address changes when you move. Do not shut off utilities needed for the buyer's final walkthrough or closing. Because providers, municipalities, contracts, and closing arrangements vary, confirm the correct effective dates before scheduling changes.

MOVE INFORMATION

Current Address	______________________	**New Address**	______________________
Expected Closing	______________________	**Move Date**	______________________
Utility Target Date	______________________	**Mail Forwarding**	______________________

UTILITIES - CURRENT HOME

Done	Account / Service	Provider / Contact	Date	Action / Guidance
[ ]	Electric			Schedule transfer/termination for the appropriate date; keep service active through walkthrough/closing when required.
[ ]	Natural Gas			Confirm final service date and meter/account instructions if applicable.
[ ]	Heating Oil / Propane			Contact provider regarding delivery, account, tank, and any contract-specific fuel adjustment questions.
[ ]	Water			Confirm whether service is municipal, private, HOA/condo managed, or otherwise billed and follow the applicable transfer process.
[ ]	Sewer / Septic / Cesspool			Confirm any account or service arrangements that apply; do not assume a private system has a utility account.
[ ]	Internet			Schedule equipment return, transfer, or new-home installation.
[ ]	Cable / Streaming Bundle			Transfer/cancel service and return leased equipment.
[ ]	Landline / Phone			Transfer or discontinue if applicable.
[ ]	Security / Alarm			Coordinate cancellation/transfer and remove personal codes; discuss included equipment with agent/attorney.
[ ]	Solar / Energy Service			Follow ownership, financing, monitoring, or transfer requirements applicable to the system.
[ ]	Trash / Private Carting			Cancel or transfer private service if applicable; municipal arrangements vary.

ADDRESS CHANGES - HIGH PRIORITY

Done	Account / Service	Provider / Contact	Date	Action / Guidance
[ ]	USPS Mail Forwarding			Submit forwarding through the official USPS process at the appropriate time.
[ ]	Driver License / DMV			Update address within the timeframe required by your state and update vehicle records as applicable.
[ ]	Banks / Credit Unions			Update mailing and residential address on financial accounts.
[ ]	Credit Cards / Lenders			Update address and billing information.
[ ]	Employer / Payroll			Update HR, payroll, benefits, and tax records.
[ ]	Insurance			Update auto, umbrella, life, and other policies; coordinate homeowners coverage timing separately.
[ ]	Tax Professional			Provide the new mailing address and retain sale/closing records.
[ ]	Government Benefits / Agencies			Update Social Security, Medicare, veterans, or other agencies if applicable.
[ ]	Voter Registration			Update registration as applicable after the move.
[ ]	Schools / Childcare			Update records and emergency contact information where applicable.

HOME & HOUSEHOLD ACCOUNTS

Done	Account / Service	Provider / Contact	Date	Action / Guidance
[ ]	Homeowners / Renters Insurance			Do not cancel the former home's coverage prematurely; confirm effective dates with your insurance professional and attorney.
[ ]	HOA / Condo / Management			Provide forwarding information and complete any required account/ownership procedures.
[ ]	Home Warranty			Transfer, cancel, or update if applicable.
[ ]	Lawn / Landscaping			Cancel or transfer recurring service.
[ ]	Pool / Spa Service			Cancel or transfer recurring service.
[ ]	Pest Control			Cancel or transfer recurring service.
[ ]	Cleaning Service			Update service address or cancel.
[ ]	Home Monitoring / Smart Devices			Remove personal access, reset accounts as appropriate, and preserve any devices included in the sale.
[ ]	Subscriptions / Deliveries			Update meal kits, newspapers, magazines, retail subscriptions, and recurring deliveries.
[ ]	Online Shopping Profiles			Update default shipping addresses and remove the former property where appropriate.

PEOPLE, PROFESSIONALS & MEMBERSHIPS

Done	Account / Service	Provider / Contact	Date	Action / Guidance
[ ]	Family / Friends			Share the new mailing address with people who need it.
[ ]	Doctors / Dentists / Pharmacy			Update contact and pharmacy information.
[ ]	Attorney / Accountant / Financial Advisor			Update mailing records.
[ ]	Gym / Clubs / Associations			Update address or transfer membership.
[ ]	Professional Licenses / Associations			Update required contact information.
[ ]	Pet Records / Veterinarian			Update address, tags, microchip registration, and licensing as applicable.
[ ]	Religious / Community Organizations			Update contact information if desired.
[ ]	Emergency Contacts			Make sure key contacts have your current address.

DO NOT FORGET BEFORE CLOSING

[ ] Keep required utilities on through walkthrough/closing

[ ] Verify homeowners insurance cancellation timing

[ ] Remove personal alarm/smart-home access

[ ] Return leased provider equipment

[ ] Set USPS forwarding

[ ] Save final bills/confirmations

[ ] Give attorney a forwarding address

Account numbers / contact notes:

SELLER HOME PREPARATION & REPAIR PLANNER

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Not every home needs a renovation before it goes on the market. Use this planner to separate high-impact preparation from unnecessary spending. Identify the issue, decide whether to clean, repair, improve, defer, or discuss it first, then track budget, responsibility, timing, and completion.

PROPERTY & PREPARATION GOAL

Property Address	____________________	**Target List Date**	________________
Preparation Budget	$___________________	**Decision Deadline**	________________

EXTERIOR & CURB APPEAL

Priority	Item / Area	Decision	Est. Cost	Vendor / Date / Notes
	Front door / entry		$	
	Landscaping / lawn		$	
	Walkways / driveway		$	
	Exterior washing / siding		$	
	Roof / gutters - visible maintenance		$	
	Deck / patio / fencing		$	
	Exterior lighting		$	
	House numbers / mailbox		$	

INTERIOR PRESENTATION

Priority	Item / Area	Decision	Est. Cost	Vendor / Date / Notes
	Declutter rooms and surfaces		$	
	Remove excess furniture		$	
	Patch minor wall damage		$	
	Touch-up paint		$	
	Deep clean floors / carpets		$	
	Clean windows / glass		$	
	Update burned-out bulbs		$	
	Organize closets / storage		$	

KITCHEN & BATHS

Priority	Item / Area	Decision	Est. Cost	Vendor / Date / Notes
	Deep clean cabinets / counters		$	
	Repair dripping faucets		$	
	Refresh caulk / grout where needed		$	
	Repair loose hardware		$	
	Clean appliances		$	
	Address minor cabinet / drawer issues		$	
	Replace visibly damaged switch/outlet covers		$	

SYSTEMS & FUNCTION

Priority	Item / Area	Decision	Est. Cost	Vendor / Date / Notes
	HVAC / boiler / furnace service		$	
	Water heater		$	
	Plumbing concerns		$	
	Electrical concerns		$	
	Doors / windows operation		$	
	Smoke / CO alarms		$	
	Pool / spa equipment		$	
	Other property-specific system		$	

DECISION GUIDE

Clean	Low-cost presentation or maintenance work that improves how the home shows.
Repair	Correct a known problem or malfunction using an appropriate professional when needed.
Improve	An elective upgrade intended to improve appeal or marketability; discuss expected value before spending.
Defer	Leave as-is when the cost/benefit does not justify action, subject to disclosure and contract obligations.
Discuss First	Pause before spending because the issue may involve permits, safety, disclosure, strategy, or specialized advice.
No Action	No work currently recommended.

BEFORE YOU SPEND MONEY

Ask whether the work is likely to improve marketability, remove a buyer objection, address a known defect, or simply satisfy a personal preference. Large renovations made immediately before selling do not automatically return their full cost. Discuss significant projects, permits, disclosures, and property-specific concerns with your agent and appropriate licensed professionals before committing.

SELLER DOCUMENT & INFORMATION ORGANIZER

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Selling a home can require information from many different places. Use this organizer to identify what you already have, what still needs to be located, and what should be discussed with your agent or New York real estate attorney. Do not delay listing solely because every document is not immediately available - the goal is to get organized early.

PROPERTY & CONTACT INFORMATION

Property Address	____________________	**Seller(s)**	____________________
Seller Attorney	____________________	**Agent Contact**	____________________
Mortgage Servicer	____________________	**HELOC / 2nd Lien**	____________________

OWNERSHIP & LEGAL INFORMATION

Status	Document / Information	What to Gather / Confirm	Notes
	Deed / ownership document	Locate the most recent deed or ownership document in your records.	
	Owner names	Confirm the names of all titled owners exactly as they appear on ownership records.	
	Trust / estate / entity documents	Locate trust, estate, probate, LLC, corporation, or power-of-attorney documents if ownership involves one.	
	Divorce / separation documentation	Tell your attorney if a divorce, separation, matrimonial order, or agreement may affect title or sale authority.	
	Existing judgments / liens	Tell your attorney about known judgments, liens, unpaid obligations, or title issues.	
	Prior title policy / survey	Locate any prior owner's title policy and survey if available; your attorney will determine usefulness.	

MORTGAGE, LIEN & FINANCIAL INFORMATION

Status	Document / Information	What to Gather / Confirm	Notes
	Primary mortgage	Record lender/servicer and loan number; do not use this public-facing worksheet to store passwords.	
	HELOC / second mortgage	Identify any open line of credit or second lien, even if the balance is currently zero.	
	Other property-secured financing	Identify solar financing, improvement loans, private mortgages, or other obligations tied to the property.	
	Property tax information	Locate recent tax bills or escrow information if available.	
	HOA / condo charges	Gather current common-charge, HOA, assessment, and management information if applicable.	
	Water / sewer balances	Locate recent bills or account information where separately billed.	
	Fuel / propane information	Locate provider and account information if fuel adjustments or tank arrangements may apply.	

PROPERTY, SYSTEMS & UTILITIES

Status	Document / Information	What to Gather / Confirm	Notes
	Electric provider / account	Record provider and service contact information.	
	Gas provider / account	Record provider if applicable.	
	Heating oil / propane	Record provider, tank ownership/rental information, and service details if applicable.	
	Water source	Identify municipal/public water or private well.	
	Wastewater system	Identify sewer, septic, cesspool, or other system as applicable.	
	Heating / cooling systems	Record approximate age, type, and recent service information if known.	
	Water heater	Record approximate age/type if known.	
	Solar / generator	Gather ownership, lease/finance, warranty, monitoring, and transfer information if applicable.	
	Pool / spa	Gather equipment, service, permit, warranty, and maintenance information if applicable.	
	Security / smart-home systems	Identify included equipment, leased equipment, subscriptions, and personal accounts/codes.	

IMPROVEMENTS, PERMITS & PROPERTY RECORDS

Status	Document / Information	What to Gather / Confirm	Notes
	Kitchen / bath renovations	Record approximate year and locate invoices, permits, warranties, or contractor information if available.	
	Additions / conversions	Gather documents for additions, garage conversions, dormers, finished basements, accessory spaces, or layout changes.	
	Roof / siding / windows	Locate installation dates, warranties, receipts, or permits if available.	
	HVAC / boiler / electrical / plumbing	Gather records for major system replacements or upgrades.	
	Deck / patio / fence / pool	Locate permits, certificates, surveys, warranties, or contractor records if applicable.	
	Certificates / municipal approvals	Locate certificates of occupancy, compliance, completion, rental/accessory approvals, or other municipal documents in your possession.	
	Open permits / known violations	Tell your agent and attorney about known open permits, violations, or unresolved municipal matters.	
	Survey / site plan	Locate the most recent survey or site plan if available.	

SALE & TRANSACTION INFORMATION

Status	Document / Information	What to Gather / Confirm	Notes
	Listing agreement	Keep a copy of the fully executed listing agreement.	
	Property disclosures / questionnaires	Complete required or requested forms accurately with guidance from your agent and attorney.	
	Included / excluded items	Maintain a clear list of fixtures and personal property included or excluded from the sale.	
	Repair / service documentation	Keep invoices and proof of work completed before or during the transaction.	
	Accepted offer terms	Keep the accepted offer summary and relevant financial terms for your records.	
	Fully executed contract	Keep the signed contract once the attorneys complete the contract process.	
	Attorney contact information	Keep your attorney's office, phone, email, and preferred communication method handy.	
	Closing records	Retain the final closing statement, payoff documentation, and other important sale records after closing.	

STATUS KEY

Have It	Located and available if requested.
Need to Locate	Expected to exist, but you still need to find or obtain it.
Requested	A professional has specifically asked you to provide it.
Not Applicable	Does not apply to this property or transaction.
Discuss	Needs clarification before you make a representation or take action.

SECURITY NOTE

Use this organizer to track documents - not to store sensitive passwords, Social Security numbers, bank login credentials, full wire instructions, or other high-risk personal information. Share sensitive documents only through methods approved by the professional requesting them, and independently verify any wiring instructions.

SELLER TRANSACTION TRACKER

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Use this master tracker to follow your home sale from preparation through closing. New York transactions do not always move on a fixed schedule, so target dates are planning tools rather than guarantees. Update the status as milestones are completed and use the Next Action column to keep the transaction moving.

TRANSACTION SNAPSHOT

Property Address	____________________	**List Date**	________________
Accepted Offer	$____________________	**Offer Accepted**	________________
Full Contract Date	____________________	**Expected Closing**	________________

PRE-LISTING & PREPARATION

Status	Milestone	Lead	Target	Done	Next Action / Guidance
	Seller consultation	Seller + Agent			Confirm goals, timing, property details, pricing process, and next steps.
	Property walk-through	Seller + Agent			Identify preparation priorities and property-specific considerations.
	Gather property information	Seller			Organize ownership, mortgage, improvement, permit, utility, and property records.
	Complete agreed preparation	Seller / Vendors			Finish prioritized cleaning, repairs, decluttering, staging, or other preparation.
	Photography & marketing prep	Agent + Seller			Prepare the property for professional marketing.
	Pricing & launch strategy	Seller + Agent			Finalize positioning, list price, showing plan, and launch date.

ACTIVE LISTING

Status	Milestone	Lead	Target	Done	Next Action / Guidance
	Listing launches	Agent			Property is placed on the market according to the agreed marketing plan.
	Showings begin	Agent + Seller			Maintain showing readiness and follow the agreed access procedure.
	Review feedback & activity	Seller + Agent			Evaluate buyer response, competition, showing activity, and market changes.
	Offer received	Seller + Agent			Review price, financing, contingencies, timing, credits, and other terms.
	Offer selected / negotiated	Seller + Agent			Negotiate the overall offer package, not price alone.

ACCEPTED OFFER & DUE DILIGENCE

Status	Milestone	Lead	Target	Done	Next Action / Guidance
	Offer accepted	Seller + Agent			Accepted offer is not yet a fully executed New York contract.
	Buyer inspection / due diligence	Buyer + Professionals			Buyer completes agreed inspection or other due diligence.
	Inspection discussions resolved	Parties / Agents / Attorneys			Address inspection-related requests or agreements as appropriate.
	Deal sheet / attorney information sent	Agents / Attorneys			Transaction details are provided so attorneys can begin the contract process.

ATTORNEY CONTRACT PROCESS

Status	Milestone	Lead	Target	Done	Next Action / Guidance
	Seller attorney prepares/reviews contract	Seller Attorney			Seller attorney handles contract language and seller legal protections.
	Buyer attorney reviews contract	Buyer Attorney			Buyer attorney completes legal review and advises the buyer.
	Buyer signs contract / deposit handled	Buyer + Buyer Attorney			The signing/deposit sequence can vary; attorneys control the process.
	Seller signs contract	Seller + Seller Attorney			Seller signs when advised by counsel.
	FULL CONTRACT	Attorneys / Parties			Buyer and seller have signed; the transaction is now in full contract.

FINANCING, APPRAISAL & TITLE

Status	Milestone	Lead	Target	Done	Next Action / Guidance
	Buyer financing continues	Buyer + Lender			Loan processing, underwriting, conditions, and lender requirements continue.
	Appraisal ordered / completed if required	Lender / Appraiser			For financed transactions, appraisal is completed after the parties are in full contract.
	Title work / legal clearance	Attorneys / Title			Title, liens, payoff, survey, municipal, and other legal items are addressed as applicable.
	Seller payoff information obtained	Seller + Attorney			Attorney obtains mortgage, HELOC, lien, or other payoff information as needed.
	Seller contract obligations completed	Seller			Complete agreed work, documents, access, and other seller responsibilities.

CLOSING PREPARATION

Status	Milestone	Lead	Target	Done	Next Action / Guidance
	Closing timing coordinated	Attorneys / Lender / Agents			Timing depends on contract terms, financing, title, and other transaction requirements.
	Move-out completed	Seller			Complete move-out in accordance with the contract and attorney instructions.
	Keys / remotes / documents gathered	Seller			Prepare items that will transfer with the property.
	Final property check	Seller			Confirm property condition, included items, utilities, and agreed work before walkthrough.

FINAL WALKTHROUGH & CLOSING

Status	Milestone	Lead	Target	Done	Next Action / Guidance
	Buyer final walkthrough	Buyer + Agent			Buyer verifies property condition and agreed items shortly before closing.
	Walkthrough issue resolved if needed	Parties / Attorneys / Agents			Address any last-minute issue through the appropriate professionals.
	Final closing figures reviewed	Seller + Attorney			Review closing statement, adjustments, payoffs, and proceeds with counsel.
	Closing	Attorneys / Parties			Documents and funds are handled and title/possession transfer according to the transaction.
	Sale records retained	Seller			Keep the final closing statement and important sale documents for long-term records.

NEW YORK / LONG ISLAND TRANSACTION SEQUENCE	
1. Offer Accepted	Seller selects an offer. The parties are not yet in full contract.
2. Inspection / Due Diligence	Buyer completes agreed inspection or due diligence in the typical Long Island resale sequence.
3. Attorney Contract Process	Attorneys prepare/review the contract, negotiate legal terms, and coordinate signing.
4. Full Contract	Buyer and seller have signed the contract.
5. Financing / Appraisal / Title	For financed purchases, appraisal occurs after full contract; lender processing and title/legal work continue.
6. Closing Preparation	Seller completes move-out and obligations; attorneys coordinate figures and closing readiness.
7. Final Walkthrough	Buyer verifies property condition and agreed items shortly before closing.
8. Closing	Documents, funds, title, keys, and possession are handled according to the contract and attorney instructions.

SELLER FINAL WALKTHROUGH PREPARATION CHECKLIST

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The buyer's final walkthrough is generally the last opportunity before closing to verify the property's condition, agreed repairs, included items, and move-out status. It is not intended to reopen the entire inspection. Use this seller checklist before the walkthrough so last-minute surprises are less likely to delay closing.

WALKTHROUGH & CLOSING INFORMATION

Property Address	______________________	**Walkthrough Date**	_________________
Expected Closing	______________________	**Move-Out Complete**	_________________
Seller Attorney	______________________	**Agent**	_________________

MOVE-OUT & GENERAL CONDITION

Done	Checklist Item	Date	Issue / Follow-Up
[ ]	Complete move-out by the time required under the contract or attorney instructions.		
[ ]	Remove seller belongings, unwanted furniture, trash, and debris unless an item is specifically included or otherwise agreed in writing.		
[ ]	Leave the property in the condition required by the contract, including any agreed cleanliness standard.		
[ ]	Check closets, cabinets, attic, basement, garage, shed, and outdoor storage for forgotten belongings.		
[ ]	Confirm no material damage occurred during packing or move-out; notify your agent immediately if something happened.		
[ ]	Keep the property secure and follow the agreed access/key plan.		

AGREED REPAIRS & TRANSACTION ITEMS

Done	Checklist Item	Date	Issue / Follow-Up
[ ]	Confirm any repairs, credits, replacements, or other seller obligations agreed to during the transaction have been handled as required.		
[ ]	Gather receipts, invoices, warranties, permits, or proof of completion when appropriate.		
[ ]	Do not substitute materials, remove agreed items, or materially change completed work without discussing it with your agent/attorney.		
[ ]	Make sure any agreed personal property that is to remain is still at the property.		
[ ]	Notify your agent promptly if an agreed item cannot be completed exactly as expected.		

FIXTURES, APPLIANCES & INCLUDED ITEMS

Done	Checklist Item	Date	Issue / Follow-Up
[ ]	Leave all fixtures and items included in the sale unless the contract or written agreement says otherwise.		
[ ]	Confirm included appliances remain in place.		
[ ]	Leave lighting fixtures, window treatments, mounted items, or other fixtures that are included in the sale.		
[ ]	Leave agreed pool, spa, outdoor, garage, or shed equipment where applicable.		
[ ]	Leave manuals, warranties, remotes, keys, and access devices that belong with included property.		
[ ]	Remove items specifically excluded from the sale without damaging the property.		

SYSTEMS & UTILITIES

Done	Checklist Item	Date	Issue / Follow-Up
[ ]	Keep electricity, heat, water, and other utilities needed for the walkthrough/closing active as required.		
[ ]	Make sure accessible major systems and included appliances are in the condition required by the contract.		
[ ]	Do not intentionally shut down, disconnect, or alter systems immediately before walkthrough unless instructed.		
[ ]	Confirm thermostats, breakers, valves, alarm/smart-home equipment, and other controls are left in an appropriate condition.		
[ ]	Address any new leak, outage, malfunction, or property damage immediately with your agent and attorney.		

KEYS, REMOTES & ACCESS

Done	Checklist Item	Date	Issue / Follow-Up
[ ]	Gather exterior door keys and other keys that transfer with the property.		
[ ]	Gather garage-door remotes and keypad/access information as applicable.		
[ ]	Gather mailbox, shed, gate, pool, storage, or other relevant keys.		
[ ]	Remove personal alarm codes and personal smart-home access as appropriate while preserving included equipment.		
[ ]	Follow your agent/attorney's instructions for where keys and access devices should be left or delivered.		

FINAL SELLER CHECK BEFORE WALKTHROUGH

Done	Checklist Item	Date	Issue / Follow-Up
[ ]	Walk through every room one final time.		
[ ]	Check that included items remain and excluded/personal items are removed.		
[ ]	Check that agreed work appears complete.		
[ ]	Check for new wall, floor, door, stair, or trim damage caused during move-out.		
[ ]	Check for running water, leaks, unusual odors, open windows, unlocked doors, or other last-minute issues.		
[ ]	Take dated photos of the general condition after move-out for your records.		
[ ]	Contact your agent immediately if anything has changed since the buyer last saw the property.		

LAST-MINUTE ISSUE PROTOCOL

1	Do not hide or ignore a new problem.
2	Photograph/document the issue when appropriate.
3	Contact your listing agent promptly.
4	Your agent and attorney can help determine the appropriate communication and next step.
5	Do not promise a credit, repair, escrow, or closing change without attorney guidance and agreement by the parties.

FINAL HANDOFF INVENTORY

[ ] House keys	[ ] Garage remotes	[ ] Mailbox / gate / shed keys	[ ] Manuals & warranties	[ ] Alarm / access info	[ ] Agreed documents	[ ] Other

Notes / walkthrough follow-up: