



PRE-SALE CAP PLANNING WORKSHEET

PLAN SMART. INVEST STRATEGICALLY.
MAXIMIZE VALUE.

Use this worksheet to evaluate and prioritize capital improvements before listing your property. Strategic investments today can enhance performance, reduce buyer concerns, and increase your return at sale.

WHY PLAN BEFORE YOU SELL?



MAXIMIZE SALE PRICE

Targeted improvements boost appeal and support higher valuations.



REDUCE RISK & UNCERTAINTY

Address deferred maintenance and system issues before buyers use them as leverage.



IMPROVE MARKETABILITY

Well-maintained properties attract more qualified buyers and faster offers.



FOCUS INVESTMENT

Allocate capital where it delivers the greatest return.



PROPERTY OVERVIEW

Property Name: _____

Year Built / Renovated: _____

Location: _____

Current List Price (Est.): _____

Property Type: _____

Target Sale Date: _____



CAPITAL IMPROVEMENT PLANNING

IMPROVEMENT CATEGORY Examples	CONDITION (1-5)	EST. COST RANGE (Low - High)	VALUE IMPACT (Low / Med / High)	PRIORITY (H / M / L)
 CURB APPEAL & EXTERIOR Landscaping, façade, signage, parking, lighting	_____	\$_____ - \$_____	_____	_____
 GUEST ROOMS & INTERIOR FINISHES Furniture, fixtures, flooring, bathrooms, millwork	_____	\$_____ - \$_____	_____	_____
 BUILDING SYSTEMS & MECHANICALS HVAC, plumbing, electrical, elevators, boilers	_____	\$_____ - \$_____	_____	_____
 ENERGY EFFICIENCY & SUSTAINABILITY LED lighting, controls, water conservation, solar	_____	\$_____ - \$_____	_____	_____
 SAFETY, SECURITY & CODE COMPLIANCE Fire systems, ADA, CCTV, access control, permits	_____	\$_____ - \$_____	_____	_____
 AMENITY & PUBLIC SPACES Lobby, fitness center, pool, meeting spaces	_____	\$_____ - \$_____	_____	_____
 FOOD & BEVERAGE AREAS Kitchen, dining, equipment, finishes	_____	\$_____ - \$_____	_____	_____
 OTHER / STRATEGIC ENHANCEMENTS Technology, Wi-Fi, signage, revenue-driving upgrades	_____	\$_____ - \$_____	_____	_____

INVESTMENT SUMMARY

Total Est. Investment (Low):

\$ _____

Total Est. Investment (High):

\$ _____

Projected Value Increase:

\$ _____

Estimated ROI:

Notes / Assumptions:



PRO TIP

Focus on improvements that buyers value most and that deliver the highest return for your investment.



SMART PLANNING. STRONGER RESULTS.

A thoughtful capital plan today can lead to a more profitable sale tomorrow. Let Ellsworth Construction Services help you prioritize, plan, and execute improvements that drive maximum value.



Visit our website or contact us to schedule a pre-sale consultation.

