

Seller's Property & Goals Questionnaire

1. General Property Information

Property Address: _____

Approximate Year Built: _____

Reason for Selling: (e.g., downsizing, relocating for work, lifestyle change)

Occupancy Status:

☐ Primary Residence

☐ Secondary / Vacation Home

☐ Income / Investment Property (If yes, is it currently tenanted? [Yes / No])

2. Property Condition & Features

Top 3 Features: What are the three things you love most about this home?

Recent Upgrades: Please list any major renovations or repairs done in the last 5 years (e.g., roof, HVAC, kitchen remodel).

Known Issues: Are there any known structural or mechanical issues that need addressing before listing?

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For wherever life takes you.

3. Financials & Timing

Target Listing Price: What is your "ideal" sale price? \$_____

Mortgage Balance: (Approximate) \$_____

Ideal Closing Date: When is your preferred move-out date? _____

4. Future Plans (Post-Sale): Understanding where you're headed helps me coordinate the timing of your sale.

Where are you moving to? (Local area, out of state, or international?)

What is your next housing plan?

☐ Buying a new home (Do you need to sell this home to afford the next one?)

☐ Renting for a period of time

☐ Moving into a second home you already own

☐ Other: _____

Contingency: Do you have a "Plan B" if the house sells faster than expected?



5. Communication Preferences

Preferred Contact Method: ☐ Phone ☐ Text ☐ Email

Best Time for Showings: (e.g., weekends only, 24-hour notice required, etc.) _____

Note to Seller: Your answers help us build a custom marketing strategy and ensure we meet your specific financial and timeline goals.



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