



WORKSHEETS

PROPERTY:



TACTICAL WORKSHEET HANDBOOK

I will use some of the the following worksheets with you to make your listing more competitive on the market, establish your financial takeaway and give you more direction when negotiating offers.

Included is a "visit log" so you can keep track of who and when is visiting your home. This log can help you and your family be aware of scheduled visits.

Once we've finalized an offer, a "moving checklist" is made available for you as key reminders of what needs to be done to prepare your move.

Keep this worksheet booklet with you and available as needed.

Donna
Real estate broker
eXp Realties



FILE DOCUMENTATION

THIS DOCUMENT ALLOWS US TO CAPTURE ALL YOUR PERTINENT DOCUMENTS TO BUILD YOUR BROKERAGE FILE AND MONITOR THEIR TRANSFER TO MY AGENCY.

IT ALSO ENSURES THAT YOU GET BACK ALL YOUR ORIGINALS.

1. Single family

Proof of identity owners



Deed of sale		Certificate of location	
Deed of loan		Mortgage balance statement	
Radiations		Home line of credit	
Municipal taxes		Non compliance notice	
School taxes		Servitudes and tolerances*	
Water taxes*		Divorce papers*	
Certificate of conformity septic tank and last cleaning*			
Lab tests (water, radon, pyrite, etc)*			
Rental invoices (propane tank, hot water tank, etc)*			
Energy bills (hydro, gas, propane, etc)			

2. Condo (all in 1 +)

Coordinates syndic and management cie.	
Declaration of co-ownership	
Rules and regulations	
Meeting minutes (3 years)	
Financials and budgets (3 years)	
Condo fees	
Maintenance log**	
Study of contingency fund**	
Certificate on state of co-ownership**	
Special assessments*	
Ongoing court proceedings*	

3. Plexes (all in 1 +)

Leases and notices	
Declarations of family residence	

4. Estates (all in 1 +)

Deed of transmission	
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* if applicable. ** potential costs

original document received by broker on:

____ / ____ / ____



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SELLER BROKER

original document remitted to seller on:

____ / ____ / ____



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SELLER BROKER

document was transmitted to broker electronically

VALUE AND EQUITY ANALYSIS

AS I PRESENT TO YOU MY COMPARATIVE MARKET ANALYSIS TO DETERMINE THE VALUE OF YOUR PROPERTY, I MAKE SURE THAT YOU BECOME AWARE OF ALL YOUR INVESTMENTS THAT ARE REQUIRED TO DETERMINE YOUR NET EQUITY.

ESTIMATE OF NET EQUITY



ADDRESS OF PROPERTY UNDER ANALYSIS

ESTIMATED SELLING PRICE

\$

required investments for the sale

Certificate of location

\$

Certified copies deeds

\$

Brokerage fees (%)

\$

GST 5%

\$

QST 9.975%

\$

Other

\$

sub-total investments

\$

required debt repayment estimates

Mortgage balance

\$

Repayment penalties

\$

Home line of credit

\$

Other

\$

sub-total debt payout

\$

other fees

Discharge fees

\$

Notary fees

\$

Title insurance

\$

Other
(RIS, ANALYSIS, ETC)

\$

sub-total other fees

\$

TOTAL REQUIRED FOR SALE

\$

ESTIMATED NET EQUITY

\$

PRICE POSITIONNING

THIS WORKSHEET WILL HELP YOU ZERO IN ON THE BEST PRICING STRATEGY TO ENSURE SUCCESS.

BY DETERMINING THE MARKET STATUS, WE CAN BEST DETERMINE HOW YOUR MARKET VALUE WILL BE INFLUENCED BASED ON YOUR PREFERRED TIMING.

PRICE POSITIONING GRID



ADDRESS OF PROPERTY UNDER ANALYSIS

ESTIMATED MARKET VALUE

\$

MARKET EFFECT ON 5% DIFFERENTIAL

	+ 5 %	0 %	- 5 %
LIST PRICE	\$		
PROBABILITY OF SALE	0 to 50%	50 to 90%	100%
TIME ON MARKET	90 to 180 days	60 to 90 days	30 days or -
BUYER ATTRACTION POWER	LOW	AVERAGE	HIGH
IMPACT ON COMPETITION	HELPS THEM	COMPETITIVE	HINDERS THEM
NEED FOR PRICE ADJUSTMENT	STRONG	UNCERTAIN	NONE
VOLUME OF VISITS	WEAK	NORMAL	HIGH
MULTIPLE OFFER POTENTIAL	0%	50%	100%
BROKER INTEREST	WEAK	NORMAL	HIGH
NET EQUITY TAKEAWAY	NONE TO LOW	UNCERTAIN	ABOVE
STRESS LEVEL ON SELLERS	HIGH	SOME	NONE
BUYER REACTIONS	NOT WORTH IT	TO CONSIDER	FEAR OF LOSS

STATE OF THE MARKET IN NEIGHBOUHOOD

BUYER'S MARKET

NEUTRAL MARKET

SELLER'S MARKET

HIGH INVENTORY

BALANCED RATIO SUPPLY-DEMAND

LOW INVENTORY



PRICING STRATEGY NOTES:

OFFER ANALYSIS

WETHER WE RECEIVE ONE OFFER OR MANY, THIS WORKSHEET PROVIDES YOU WITH A SUMMARY OF EACH OFFER BY USING KEY CRITERIA THAT ARE IMPORTANT TO YOU.

WHEN RECEIVING MORE THAN ONE OFFER AT A TIME, WE CAN EASILY "COMPARE" THEM TO EACH OTHER TO HELP YOU REACT ACCORDINGLY.

OFFER ANALYSIS GRID



	PP1	PP2	PP3
#Promise to purchase	<input type="text"/>	<input type="text"/>	<input type="text"/>
PRICE OFFERED \$	<input type="text"/> \$	<input type="text"/> \$	<input type="text"/>
% OF FINANCING	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
PRE-QUALIFICATION RECEIVED?	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
C O N D I T I O N S			
8.1 INSPECTION	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
DELAY INSPECTION	<input type="text"/> DAYS	<input type="text"/> DAYS	<input type="text"/> DAYS
6.2 FINANCING	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
DELAY FINANCING	<input type="text"/> DAYS	<input type="text"/> DAYS	<input type="text"/> DAYS
9.1 DOCUMENTS	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
DELAY DOCUMENTS	<input type="text"/> DAYS	<input type="text"/> DAYS	<input type="text"/> DAYS
R2.1 SALE BUYER HOME	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
DELAY SALE BUYER HOME	<input type="text"/> DAYS	<input type="text"/> DAYS	<input type="text"/> DAYS
OTHER 1 (specify)	<input type="text"/>	<input type="text"/>	<input type="text"/>
DELAY OTHER 1	<input type="text"/> DAYS	<input type="text"/> DAYS	<input type="text"/> DAYS
OTHER 2 (specify)	<input type="text"/>	<input type="text"/>	<input type="text"/>
DELAY OTHER 2	<input type="text"/> DAYS	<input type="text"/> DAYS	<input type="text"/> DAYS
DELAY OF ACCEPTANCE	<input type="text"/> HRS	<input type="text"/> HRS	<input type="text"/> HRS
LEVEL OF FAILURE RISKS	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
POTENTIAL FOR A COUNTER	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
POTENTIAL AS 2ND RANK	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
NOTES ON RESPONSE STRATEGI	<input type="checkbox"/> = FAVORABLE	<input type="checkbox"/> = UNCERTAIN	<input type="checkbox"/> = UNFAVORABLE

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POTENTIAL FOR A COUNTER	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
POTENTIAL AS 2ND RANK	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
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POTENTIAL AS 2ND RANK	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
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VISITS REGISTER

YOUR VISITORS LOG ALLOWS YOU TO MONITOR WHO WISHES TO
SEE YOUR PROPERTY AND THEIR ALLOCATED BROKER.

USE IT TO NOTE DOWN APPOINTMENTS AS A SHARED
WORKSHEET WITH YOUR FAMILY

V I S I T O R S L O G



I will notify you at least 24 hours in advance of a visit, unless the request is more urgent.

DAY	DATE	HOUR

VISITING BROKER

DAY	DATE	HOUR

VISITING BROKER

DAY	DATE	HOUR

VISITING BROKER

DAY	DATE	HOUR

VISITING BROKER

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DAY	DATE	HOUR

VISITING BROKER

DAY	DATE	HOUR

VISITING BROKER

DAY	DATE	HOUR

VISITING BROKER

MOVING CHECKLIST

ONCE A PROPOSAL HAS BEEN FINALIZED, YOU CAN USE THIS
TEMPLATE TO CHECK OFF WHAT NEEDS TO BE DONE TO MAKE
YOUR MOVE MUCH EASIER.

M O V I N G C H E C K L I S T



Send address change cards

- Post office
- All accounts
- Subscriptions
- Friends
- Family members
- Coordinate and reserve movers

Advise service providers on date of cancellation of account, request refunds on deposits and provide new address for final billing.

- Water
- Hydro Quebec
- Énergir
- Télécommunications
- Rentals
- Other:

Cancel regular deliveries

- Newspaper
- Amazon
- Magazines
- Oil delivery
- Propane delivery
- Other

Cancel service contracts

- Snow removal
- Lawn care
- Cleaning services
- Pool maintenance
- Other

Close or open pool depending on agreement on your offer

Fill energy tanks (propane, oil) 10 days prior to notary fair reimbursement (*bring invoice with you*)

Take water meter reading for notary (*if applicable*)

Transfer all bank accounts to new destination

Advise insurance companies or brokers

- Health
- Life
- Auto
- Home

Ensure your insurance coverages follow you to your next destination

Obtain all school documents for the children

Obtain all certificates (birth and baptism)

Obtain all legal documents

Check to see if you will need to be updated should you be moving out of the province

Obtain all medical files

- Family doctor
- Dentist
- Optometrist
- Thérapist
- Others

Update prescriptions

Tune up the car for your trip

Leave all instruction manuals and warranties of appliances and systems on kitchen counter

Leave me the key and original deeds with me so I may bring them to the notary.



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AUTHORIZED
LICENCE
HOLDER

