![eXp Realty logo]

W
ORKSHEETS

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 YOU BROKERAGE FILE AND MONITOR THEIR TRANSFER TO MY AGENCY.

IT ALSO ENSURES THAT YOU GET BACK ALL YOUR ORIGINALS.

Seller documents exchange list

eXp REALTY®

1. Single family

Owners proof of identification ☐ 🟩 🟦

Deed of sale	☐ 🟩 🟦	Certificate of location	☐ 🟩 🟦
Deed of loan	☐ 🟩 🟦	Mortgage balance statement	☐ 🟩 🟦
Discharge	☐ 🟩 🟦	Home line of credit	☐ 🟩 🟦
Municipal taxes	☐ 🟩 🟦	Notice of non-compliance	☐ 🟩 🟦
School taxes	☐ 🟩 🟦	Servitudes and tolerances*	☐ 🟩 🟦
Water taxes*	☐ 🟩 🟦	Divorce papers*	☐ 🟩 🟦

Septic tank certificate and last cleaning* ☐ 🟩 🟦

Lab test reports (water, radon, pyrite, etc)* ☐ 🟩 🟦

Rental invoices (hot water tank, propane tank, etc)* ☐ 🟩 🟦

Energy bills (hydro, gas, propane, etc) ☐ 🟩 🟦

2. Condo (all in 1 +)

Administrative contact and coordinates ☐ 🟩 🟦

Declaration of co-ownership ☐ 🟩 🟦

Rules and regulations ☐ 🟩 🟦

Meeting minutes (last 2 years) ☐ 🟩 🟦

Financial statements + budgets (last 2 years) ☐ 🟩 🟦

| Condo fees | ☐ 🟩 🟦 | Special assessments* | ☐ 🟩 🟦 |
| Maintenance log* | ☐ 🟩 🟦 | Pending litigations* | ☐ 🟩 🟦 |

3. Plex (all in 1 +)

Leases and renewals ☐ 🟩 🟦

Declarations of family residence ☐ 🟩 🟦
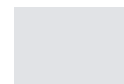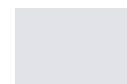
4. Estate (all in 1 +)

Deed of transmission ☐ 🟩 🟦

* if applicable

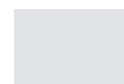☐ the original paper document was RECEIVED by broker, on: _____ / _____ / _____

SELLER   BROKER

🟩 the original document was RETURNED to the seller by broker , on: _____ / _____ / _____

SELLER   BROKER

🟦 the document was transmitted to Broker in electronic format.

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

Morgage balance $

Repayment penalties $

Home line of credit $

Other $

sub-total debt payout $

other fees

Discharge fees $

Notary fees $

Title insurance $

Other $

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

LIST PRICE	+ 5 %	0 %	- 5 %
	$		
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

eXp REALTY

	PP1	PP2	PP3
#Promise to purchase			
PRICE OFFERED	$	$	$
% OF FINANCING	%	%	%
PRE-QUALIFICATION RECEIVED?	🟩 🟥	🟩 🟥	🟩 🟥

C O N D I T I O N S

	PP1	PP2	PP3
8.1 INSPECTION	🟩 🟥	🟩 🟥	🟩 🟥
DELAY INSPECTION	DAYS	DAYS	DAYS
6.2 FINANCING	🟩 🟥	🟩 🟥	🟩 🟥
DELAY FINANCING	DAYS	DAYS	DAYS
9.1 DOCUMENTS	🟩 🟥	🟩 🟥	🟩 🟥
DELAY DOCUMENTS	DAYS	DAYS	DAYS
R2.1 SALE BUYER HOME	🟩 🟥	🟩 🟥	🟩 🟥
DELAY SALE BUYER HOME	DAYS	DAYS	DAYS
OTHER 1 (specify)			
DELAY OTHER 1	DAYS	DAYS	DAYS
OTHER 2 (specify)			
DELAY OTHER 2	DAYS	DAYS	DAYS
DELAY OF ACCEPTANCE	HRS	HRS	HRS
LEVEL OF FAILURE RISKS	🟩 🟨 🟥	🟩 🟨 🟥	🟩 🟨 🟥
POTENTIAL FOR A COUNTER	🟩 🟨 🟥	🟩 🟨 🟥	🟩 🟨 🟥
POTENTIAL AS 2ND RANK	🟩 🟨 🟥	🟩 🟨 🟥	🟩 🟨 🟥

NOTES ON RESPONSE STRATEGI

🟩 = FAVORABLE   🟨 = UNCERTAIN   🟥 = UNFAVORABLE

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DELAY OTHER 2	DAYS	DAYS	DAYS
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POTENTIAL FOR A COUNTER	🟩 🟨 🟥	🟩 🟨 🟥	🟩 🟨 🟥
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LEVEL OF FAILURE RISKS	🟩 🟨 🟥	🟩 🟨 🟥	🟩 🟨 🟥
POTENTIAL FOR A COUNTER	🟩 🟨 🟥	🟩 🟨 🟥	🟩 🟨 🟥
POTENTIAL AS 2ND RANK	🟩 🟨 🟥	🟩 🟨 🟥	🟩 🟨 🟥

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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

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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.

MOVING CHECKLIST

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

- Newpaper
- 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 notairy foir 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 needs 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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