WORKSHEETS

PROPERTY:

eXp REALTY

TACTICAL WORKSHEET HANDBOOK

Together, we will use some of the following worksheets to make your listing **more competitive** on the market, establish your financial takeaway and **give you more directio**n in terms of pricing your home and considering 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 IN ORDER TO BUILD YOU BROKERAGE FILE AND MONITOR THEIR TRANSFER TO MY AGENCY.

IT ALSO ENSURES THAT YOU GET BACK ALL YOUR ORIGINALS AS WE SIGN OFF ON EACH ONE.

document exchange register

1. Single family

Proof of identity owners

Deed of sale
Deed of loan
Radiations
Municipal taxes
School taxes
Water taxes*
Certificate of location
Mortgage balance statement
Home line of credit
Non compliance notice
Servitudes and tolerances*
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

* if applicable. ** potential costs

original document received by broker on: _____ / _____ / _____

SELLER BROKER

original document remitted to seller on: _____ / _____ / _____

SELLER BROKER

document was transmitted to broker electronically

INSCLUSIONS & EXCLUSIONS

THIS DOCUMENT ENSURES THAT ALL ITEMS YOU WISH TO EITHER INCLUDE OR EXCLUDE FROM THE SALE OF YOUR PROPERTY BE PRECISELY REFLECTED ON YOUR LISTING SHEET.

INCLUSIONS AND EXCLUSIONS CHART

FOR THE PROPERTY LOCATED AT

TRADITIONALLY, ITEMS SUCH AS LIGHT FIXTURES THAT A PERMANENTLY FIXED TO CEILINGS AND WALLS ARE ASSUMED TO BE INCLUDED UNLESS STATED OTHERWISE. THIS FORM IS TO ENSURE CLARIFICATION OF INCLUSIONS AND EXCLUSIONS FOR LISTING PURPOSES.

INCLUSION ✔ EXCLUSION ✖

KITCHEN

	FRIDGE	STOVE	MICROWAVE	HOOD VENT	WATER FILTER
brand	_____	_____	_____	_____	_____
	COMPACTOR	STOVE	WINE FRIDGE	DINETTE SET	GARBURATOR
brand	_____	_____	_____	_____	_____
OTHER	_____	_____	_____	_____	

MAIN AREA

OTHER _____ _____ _____

OTHER _____ _____ _____

OTHER _____ _____ _____

BEDROOMS

OTHER _____ _____ _____

OTHER _____ _____ _____

OTHER _____ _____ _____

BASEMENT

OTHER _____ _____ _____

OTHER _____ _____ _____

OTHER _____ _____ _____

EXTERIOR

OTHER _____ _____ _____

OTHER _____ _____ _____

OTHER _____ _____ _____

MISCELANEOUS

OTHER _____ _____ _____

OTHER _____ _____ _____

OTHER _____ _____ _____

VALIDATION OF SELLER AND BROKER ON THIS DATE: _____/_____/_____

SELLER BROKER

VALUE AND EQUITY ANALYSIS

AS I PROVIDE 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 TAKE AWAY.

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 (CERTIFICATES, TITLES, ETC)	$
sub-total other fees	$
TOTAL REQUIRED FOR SALE	$
ESTIMATED NET EQUITY	$

PRICE POSITIONNING

I WILL GUIDE YOU THROUGH THIS WORKSHEET TO HELP YOU ZERO-IN ON THE BEST PRICING STRATEGY TO INCREASE YOUR CHANCES OF A SUCCESSFUL SALE.

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

PRICE POSITIONING GRID

ADDRESS OF PROPERTY UNDER ANALYSIS	
ESTIMATED MARKET VALUE	$

MARKET VALUE ON 5% DIFFERENTIAL

	WITHIN THE +5% RANGE	AT MARKET VALUE	WITHIN THE -5% RANGE
LIST PRICE	$		
PROBABILITY OF SALE	0 to 50%	50 to 75%	75 to 100%
TIME ON MARKET	OVER AVG	AS PER AVG	UNDER AVG
BUYER ATTRACTION POWER	LOW	AVERAGE	HIGH
IMPACT ON COMPETITION	HELPS THEM	COMPETITIVE	HELPS YOU
NEED FOR PRICE ADJUSTMENT	STRONG	UNCERTAIN	NONE
VOLUME OF VISITS	LOW TO NONE	NORMAL	HIGH
MULTIPLE OFFER POTENTIAL	0%	25%	75%
BROKER INTEREST	WEAK	NORMAL	HIGH
NET EQUITY TAKEAWAY	NONE TO LOW	PROBABLE	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 WHILE ANALYZING THEIR PROS AND CONS.

OFFER ANALYSIS GRID

	PP1	PP2	PP3
#Promise to purchase			
PRICE OFFERED $	$	$	$
% IN FINANCING	%	%	%
PRE-QUALIFICATION RECEIVED?	Y N	Y N	Y N
CONDITIONS			
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

= FAVORABLE = UNCERTAIN = UNFAVORABLE

SIGNING DATE			
OCCUPANCY DATE			
DELAY OF ACCEPTANCE	HRS	HRS	HRS
LEVEL OF FAILURE RISKS			
POTENTIAL FOR A COUNTER			
POTENTIAL AS 2ND RANK			

NOTES

OFFER ANALYSIS GRID

	PP1	PP2	PP3
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PRICE OFFERED $	$	$	$
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PRE-QUALIFICATION RECEIVED?	Y N	Y N	Y N
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DELAY OTHER 1	DAYS	DAYS	DAYS

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LEVEL OF FAILURE RISKS			
POTENTIAL FOR A COUNTER			
POTENTIAL AS 2ND RANK			

NOTES

VISITS REGISTER

YOUR VISITORS LOG ALLOWS YOU TO MONITOR UPCOMING VISITS AND THE ALLOCATED BROKER.

USE IT TO NOTE DOWN APPOINTMENTS AS A SHARED WORKSHEET WITH YOUR FAMILY SO EACH IS AWARE OF THE REQUIRED PREP TIMES.

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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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

- [ ] 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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