
For Sale By Owner Checklist

256 Point
Checklist for
Selling Your
Home Yourself.



For Sale by Owner Self Help Checklist.

Item	Pre-Listing	Assign to	Done	Notes to yourself
1	Research ownership			
2	Research legal description			
3	Assessment & status			
4	Research all comparable currently listed properties			
5	Research previous sales activity, expire, active			
6	Order property profile from title company/land titles			
7	Review property profile			
8	Access tax information ordered			
9	Review tax information			
10	Research legal names on title			
11	Complete market study, prepared (CMA) and total market overview (TMO)			
12	Enter in pre-list software or MLS			
13	Send confirmation of listing appointment			
14	Prepare listing presentation			
15	Assign Excalibur 24hr Talking Ad Code To Property			
16	Write a selling script for this property from details gathered and your knowledge of the area			
17	Record selling script into 24hr Talking Ad Code			
18	Prepare letter or post card with your 1-800 24 hr Talking Ad number and code. Include with Video or pre-listing package.			
19	Have pre-listing package delivered to seller			
20	Call to confirm appointment with seller, ask pre-appointment questions you may have			
21	Good luck with your listing presentation			
22	Present market study to seller, including comparable/s, sold/s, current listings & expired			
23	Present strategic master marketing plan to seller			
24	Call your 1-800 24hr talking ad and have seller listen to their listing. You may also have the email notice to your cel phone or pager. Mr. Seller "We respond immediately to all calls on your property"			
25	Discuss preparation needed to market effectively			
26	Plan goals with seller			
27	Present plan of action to seller			
28	Suggest financing alternatives			
29	Listing contract & addendum/s signed by seller			
30	Property disclosure form filled out and signed			
31	Job well done you got the listing			
32	Pre-listing information package picked up			
33	Ask Seller for a referral. "Do you know anyone thinking of selling that could benefit from this level of home marketing service?"			
34	Video picked up for recycling or seller gives to friend			
35	Pre-listing checklist completed			

Item	Listing Checklist	Assign to	Done	Notes to yourself
1	Open file on new listing			
2	Advise staff of new listing			
3	Review current title information			
4	Order plot map			
5	Lot size confirmed			
6	Owners house plans received if applicable			
7	House plans reviewed			
8	Organize file in proper order			
9	Make contact cards			
10	Put into letter sequence			
11	Order Just Listed post cards or door hangers			
12	Rewrite your 1-800 24hr Talking Ad Script for this property			
13	Record revised script in assigned code			
14	Prepared sign rider with assigned your 1-800# & 24hr Talking Ad Code			
15	Have Sign installed With 24hr Talking Ad Sign Rider			
16	Call owner to schedule caravan/office tour/MLS tour			
17	Prepare flyers and feedback form and faxes for caravan (Include your 1-800# & 24hr Talking Ad Code)			
18	Interior room sizes measured			
19	Exterior home dimensions plotted/measured			
20	Ask seller for copies of any warranties still in place and transferable			
21	Year home was built researched			
22	Property disclosure delivered			
23	Property data sheet prepared for office			
24	Showing instructions prepared, office notified			
25	Loan/Mortgage Company & Loan/Mortgage Number, Sellers Lawyer information, provided by Seller			
26	Written permission from the seller to obtain information from the lender/mortgage			
27	Current loan/mortgage information verified by lender			
28	Loan/mortgage assumption requirements researched			
29	Second loan/mortgage company & loan/mortgage number provided by seller			
30	Second loan/mortgage information verified with lender			
31	Review current appraisal if available			
32	Lot information researched for size & dimensions			
33	Land use researched			
34	Zoning researched			
35	Required elementary school researched			
36	Required junior high school researched			
37	Required high school researched			
38	Home owner association manager contacted			
39	Homeowner association fee researched			
40	Copy Of By-Laws, Financial Statements, Rules And Regs if property is in a building scheme or fenced community			
41	Home owner association services provided			

Item	Listing Checklist	Assign to	Done	Notes to yourself
42	Have extra key for lock box			
43	Lock box installed			
44	"Terms" Sign Installed (Bright Ugly Attention Getting Sign) with only your 1-800 and the 24hr Talking Ad code and your USP			
45	Brochure box installed			
46	Average utilities researched			
47	Sewer/septic system researched			
48	Electric bills researched			
49	Water fees or rates researched			
50	Natural gas availability researched			
51	Propane tank lease term and rate verified			
52	Oil tank lease term and rate verified			
53	Property inclusions and amenities are noted			
54	Ads written with seller's input			
55	Color photos taken			
56	Power of attorney reviewed and filed			
57	All prorating are researched and noted			
58	All rents and deposits are verified			
59	Copy of leases provided			
60	Set meeting with tenant, create working relationship, set showing schedule, tenant as potential buyer			
61	Coordinate showings with tenant			
62	First right of refusal verified			
63	Repairs and maintenance noted/completed			
64	Property disclosure form posted			
65	Home owner warranty made available			
66	Home owner warranty application completed			
67	Home owner warranty application mailed			
68	Home owner warranty received			
69	Home owner warranty filed			
70	New listing entered into MLS system (Add your 1-800# & 24hr Talking Ad Code to the remarks section)			
71	Listing Checklist Complete			
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Item	Marketing Checklist	Assign to	Done	Notes to yourself
1	Add property to office active inventory list			
2	Confirm owner has a copy of the listing agreement			
3	Proof MLS computer printout			
4	Marketing flyer prepared (Include your 1-800# & 24hr Talking Ad Code)			
5	Add new listing to your web site and include Excalibur E-Ad Audio Link for this listing			
6	Email message prepared with your 1-800#, 24 hr Talking Ad code and hot link to this listing on your web site			
7	Marketing flyer mailed to seller for review			
8	Marketing flyer delivered to brochure box			
9	Load Fax Back Material (Flyer, Your profile sheet, Location Map, Mortgage Qualification Sheet, etc.) Into your 1-800# & 24hr Talking Ad Code for this property			
10	Put marketing flyers in all agent mail boxes at all board offices			
11	Email blast to top 10% agents in area			
12	Email blast to your data base of potential buyers			
13	Email blast to preferred brokers			
14	Promote at office sales meeting			
15	Include in office tour of new listings			
16	Include in MLS/caravan of new listings			
17	Promote At Board Of Realtors Meeting, leads group, etc.			
18	Mail out "just listed" announcements to neighborhood			
19	Advise network referral program			
20	Notify your Buyer agents of new listing			
21	If applicable do a Voice Broadcast to Geographic Prospect Area or your database of clients that has said "give me a call when you find ?? Type of property" [Excalibur's voice broadcasting services]			
22	Assigned Buyer's Agents follows-up on each audio E-lead from the Excalibur system (your 1-800# & 24hr Talking Ad Code)			
23	Provide marketing data to incoming referral buyers			
24	Provide "special feature" cards for marketing (if applicable)			
25	Write Ad for newspaper (Include your 1-800# & 24hr Talking Ad Code)			
26	Advertise in paper on rotating basis			
27	Mail copy of newspaper ad to seller			
28	Write Ad for homes magazines (Include your 1-800# & 24hr Talking Ad Code)			
29	Advertise in homes magazines			
30	Mail copy of homes magazines to seller			
31	Post just listed card with your 1-800# & 24hr Talking Ad Code on local public notice boards			
32	Make up a sheet of peel and stick labels for your Ringin Cards (Include your 1-800# & 24hr Talking Ad Code). Give 10 to your seller to handout to people in their area of influence [ringing cards available from Excalibur]			

Item	Marketing Checklist	Assign to	Done	Notes to yourself
33	Include in Real Estate insider newspaper			
34	Include in your next newsletter			
35	Loan/mortgage information reviewed and filed			
36	Loan/mortgage information updated if necessary in MLS			
37	Feedback faxed or emailed to agents after showings			
38	Showing Feedback with activity report from the Excalibur system Conveyed To Sellers Weekly			
39	Weekly market study reviewed			
40	Regular calls to seller to discuss marketing and pricing			
41	Prepare information for homes TV show			
42	Write TV Script (Include your 1-800# & 24hr Talking Ad Code)			
43	Pre-qualify all buyers when possible			
44	Price change entered into MLS computer			
45	Record price reduction message into the secondary message of your 1-800 24hr Talking Ad Code			
46	Price change announced to all agents			
47	Price change on flyers			
48	New flyers delivered as needed			
49	Refer seller to one of the best agents at their Out-Of-Town destination if applicable			
50	Fax or email seller profile and a commission confirmation form			
51	Marketing Checklist Complete			
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Item	Initial Offer Checklist	Assign to	Done	Notes to yourself
1	Offer received			
2	Offer reviewed with agent			
3	Discuss buyers qualifications & offer			
4	Offer reviewed with seller			
5	All responses are reviewed			
6	All needed forms are presented to complete the sale			
7	Offer is accepted, amended or countered			
8	Signed offer is delivered to buyer's agent			
9	Contract is signed by all parties			
10	Initial Offer Checklist Complete			
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Item	Under Contract/Offer Accepted Checklist	Assign to	Done	Notes to yourself
1	Copies of contract to seller			
2	Copies Of Contract For working file			
3	Copies of contract in office file			
4	Original documents filed with buyer's agent obtaining offer			
5	Sales in progress checklist completed			
6	Earnest money/deposit is recorded			
7	Earnest money/deposit is deposited in agency escrow/trust account			
8	Closing file forms and files updated			
9	Showings are restricted as seller requests			
10	Coordinate with buyer's agent and lender			
11	Fax copies of contract and addendum/s to lender			
12	Confirm purchase is pre-qualified			
13	Review credit report results			
14	Provide credit information to seller			
15	Assist in arranging financing			
16	Coordinate Discount Points/Interest Rate Pre-approval Being Locked With Closing Dates			
17	Provide comparable sales for appraiser			
18	Schedule building inspection if applicable			
19	Follow-up and review results with seller and buyer			
20	Schedule pest control inspection if applicable			
21	Follow-up and review results with seller and buyer			
22	Schedule appraisal			
23	Follow-up on appraisal			
24	Appeal for increase if appraisal is low			
25	Confirm verifications of deposit and employment have been returned			
26	Follow loan/mortgage processing through to the underwriter			
27	Contact lender weekly to track processing			
28	Relay loan status to seller			
29	Fax copies of contract and addendum/s to the title company/lawyer			
30	Fax closing and control form to the title company/lawyer			
31	Confirm loan/mortgage payoff statement created			
32	Confirm loan/mortgage assumption statement ordered			
33	Contact existing lender for assumption requirements			
34	Compile all required items for assumption			
35	Submit all required items for assumption			
36	Order title insurance commitment			
37	Review title insurance commitment			
38	Confirm purchaser received title insurance commitment			
39	Confirm selling agent received title insurance commitment			
40	Note title insurance requirements			
41	Coordinate meeting all title insurance requirements			
42	Have buyers hazard insurance delivered			
43	Provide "home owners warranty" for closing			
44	Coordinate home inspection			
45	Review the home inspection results			

Item	Under Contract/Offer Accepted Checklist	Assign to	Done	Notes to yourself
46	Negotiate the payment and completion of all required repairs			
47	Inspection clause requirements completed			
48	Septic inspection ordered			
49	Septic report received and reviewed			
50	Copy of septic inspection report delivered to lender and buyer			
51	Copy of septic inspection report filed			
52	Well flow test ordered			
53	Well flow test report received and reviewed			
54	Copy of well flow test report delivered to lender & buyer			
55	Copy of well flow test report filed			
56	Water quality test ordered			
57	Water quality test received & reviewed			
58	Copy of water quality test delivered to lender & buyer			
59	Copy of water quality test filed			
60	Loan/mortgage approved			
61	Closing location selected			
62	Closing date confirmed			
63	Closing time scheduled with seller			
64	Closing time schedule with title company/attorney			
65	Closing time scheduled with lender/attorney			
66	Closing time scheduled with selling agent			
67	Closing time scheduled with buyer			
68	Final walk through scheduled for buyer			
69	Closing figures requested from title company/attorney			
70	Closing figures received and reviewed			
71	Closing figures forwarded to buyer			
72	Closing documents requested			
73	Confer and review documents with seller's attorney			
74	Provide earnest money check for escrow/trust accounts			
75	Oversee the entire closing process			
76	Coordinate this closing with seller's next purchase			
77	Under Contract/Offer Accepted Checklist			
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80	Need to set-up a conference call with out of town buyers, buyer/seller lawyers, inspection authorities, other real estate agent? Use Excalibur's smart conference call service			

Item	Post-Listing Checklist	Assign to	Done	Notes to yourself
1	Up-date sellers information in data base			
2	Add buyers information to data base			
3	Set follow-up alerts in data base for both buyer and seller			
4	Remove lawn signs, lock box, etc.			
5	Reassign 24hr Talking Ad Code To Another New Listing			
6	Generate seller's "thank you letter"			
7	Generate buyer's "thank you letter"			
8	Have your new home owner's package personally delivered			
9	Have a small box of business cards made for buyer			
10	Inform welcome wagon of new owner			
11	Add this buyer to your "client for life" marketing and referral program			
12	Post-Listing Checklist Complete			
Item	Other Points a Real Estate Agent, Buyers and Seller should be aware of if applicable to the area	Assign to	Done	Notes to yourself
1	Radon Gas testing, monitoring and review			
2	Asbestos testing, monitoring and review			
3	Lead testing, monitoring and review			
4	Hazardous Wastes testing, monitoring and review			
5	Ground Water Contamination testing, monitoring and review			
6	Formaldehyde testing, monitoring and review			
7	Special area tax, special community tax, etc.			
8	Road allowances and right-of-ways			
9	High water mark, water's edge, shore road allowance and water right-of-ways			
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