

HOUSE HUNTING Checklist

TOTAL SCORE

RATE EACH FEATURE
FROM 1 (WORST)
TO 5 (AWESOME)



Melanie Lucero & Mike Boyce

YOUR LOCAL REAL ESTATE
PROFESSIONALS

540-870-0714 office
123-456-7890 mobile
Melanie@TheMGroupVA.com
www.TheMGroupVA.com

ADDRESS:
PRICE: HOA FEE: TAXES:
BEDROOMS: BATHROOMS: YEAR::
LOT SIZE: HOME SIZE: STOREY:

EXTERIOR	1	2	3	4
View	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Yard / landscaping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Fences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Roof / Gutters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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AC / Fans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Heating	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Security	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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BASEMENT

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PRE-LISTING Checklist

OVERALL INTERIOR

- Clean/wax/refinish floors
- Clean mirrors
- Clean fireplaces
- Lightly oil squeaking hinges
- Remove excess or tired furniture
- Tighten up loose doorknobs
- Clean windows and window wells
- Repair holes and cracks in walls
- Repaint with neutral colors
- Touch up ceiling
- Clean baseboards and trim
- Organize basement
- Check and replace lightbulbs
- Add lamps to any dark space
- Dust all lights and ceiling fans
- Dust shelves and wall art
- Remove personal photos
- Have carpets professionally cleaned
- Fix leaky faucets
- Organize closets leaving free space
- Clean all blinds and curtains
- Check window seals and locks
- Clean all filters and vent covers
- Replace worn pillows and rugs
- Place fresh flowers on the table
- Clean all doors
- Put away shoes
- Put away pet food & supplies
- Minimize furniture
- Clean fireplaces
- Clean upholstery
- Prune and nurture all house plants

KITCHEN

- Deep clean refrigerator and stove
- Ensure all appliances are working
- Wash all cabinets fronts
- Organize to create space
- Remove magnets from the refrigerator
- Take out all trash and hide trash can
- Display anything visible through glass

LIVING ROOM

- Keep furniture at a minimum
- Keep coffee tables clear
- Remove any ashtrays
- Clean fireplaces
- Clean upholstery
- Use pillows & throws

BEDROOMS

- Declutter and create empty space in closets
- Store daily necessities in drawers
- Dust and organize nightstands
- Launder bedding and pillows
- Clean Shades and curtains
- Organize furniture to look spacious
- Purchase new bedspreads if necessary

DINING ROOM

- Keep the dining table clear
- Use one nice centerpiece
- Clean any glass displays
- Make sure the chandelier is 60" from the floor minimum



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PRE-LISTING Checklist

BATHROOM

- Clean all surfaces
- Remove rust and mildew stains
- Clean soap residue
- Recaulk shower / sink / tub / cabinetry
- Replace worn rugs and towels
- Clean or replace shower curtain
- Coordinate all linens in one or two colors
- Fold towels in thirds on the rack
- Clean and repair grout
- Check water is draining correctly
- Ensure the toilet operates properly
- Check the exhaust fan
- Check water pressure
- Hide garbage cans & cleaning supplies
- Organize cabinets to be nice and neat

LAUNDRY ROOM

- Clean all surfaces
- Put soap and supplies in cupboards
- Organize shelves
- Wipe down washer and dryer
- Put all clothing away

GARAGE

- Powerwash floors
- Organize to create floor space
- Organize items in bins on shelves
- Cover exposed wiring
- Ensure the garage door is working

EXTERIOR

- Powerwash driveway and siding
- Remove driveway stains
- Fill driveway cracks
- Repaint or stain patio
- Clean windows and wells
- Repaint siding
- Clean and repair gutters
- Replace missing shingles
- Ensure lights are working
- Make sure doorbell is working
- Check home alarm functions
- Make any necessary roof repairs
- Clean pool / spa
- Clean filters and plumbing
- Clean all outdoor items
- Light the driveway & sidewalks

CURB APPEAL

- Add plants
- Mow lawn
- Trim around walkways
- Trim trees and bushes
- Remove weeds from flowerbeds
- Mulch around trees and flowerbeds
- Clean and paint the front door
- Add a new doormat
- Upgrade your mailbox
- Install a new door handle
- Install new house numbers



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FINAL WALKTHROUGH

CLOSING DATE

MOVING DATE

ADDRESS



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Closing CHECKLIST for sellers

BEFORE CLOSING DAY

- Gather all closing documents
- Notify everyone about your moving
 - Employers
 - Insurance providers
 - Family & friends
 - Veterinarian and kennel
 - Local post office
 - Utilities / phone / internet
 - Current landlord
 - Banks and credit unions
 - Government agencies
 - Medical care providers
 - Subscriptions
 - Schools
- Put all the keys and remotes in one place
- Cancel your current home insurance
- Cancel or transfer current home utilities
- Gather any appliance manuals, warranties
- Close any open valves
- Deep clean
- Close curtains, lock windows
- Shut off lights
- Unplug everything

ON CLOSING DAY

Bring the following items with you

- Photo ID for all the sellers
- A pen
- Receipts / home repair documents
- Main keys and codes to access your home
- Your home's deed
- Form of payment for all the closing costs

AFTER CLOSING DAY

- Gather all closing documents
- Notify everyone about your moving



Melanie Lucero & Mike Boyce

YOUR LOCAL REAL ESTATE
PROFESSIONALS

FINAL WALKTHROUGH

CLOSING DATE

MOVING DATE



THE M GROUP

Closing CHECKLIST for buyers

BEFORE CLOSING DAY

- Carefully review the closing disclosure provided by your lender
- Schedule and complete home inspection
- Negotiate any inspection requests with seller
- Coordinate and complete home appraisal
- Secure homeowners insurance and provide the details to your lender 10 days before closing
- Coordinate with your lender for funds, including down payment and closing costs
- Collect necessary documents such as IDs and any paperwork
- Clear title and provide title search to mortgage lender
- Purchase title insurance
- Arrange for utilities to be transferred to your name
- Make sure contingencies completed
- Notify landlord and confirm move-out details
- Cancel contracted services (garden, lawn care etc.)
- Schedule a final walk-through of the property to confirm its condition
- Make your address change official, notify USPS
- Schedule a moving service or reserve a moving truck
- Notify everyone about your moving:
 - Employers
 - Family & friends
 - Local post office
 - Current landlord
 - Government agencies
 - Subscriptions
 - Insurance providers
 - Veterinarian and kennel
 - Utilities / phone / internet
 - Banks and credit unions
 - Medical care providers
 - Schools

ON CLOSING DAY

- Bring a valid photo ID
- Bring proof of homeowners' insurance
- Bring copy of the contract with the seller
- Bring home inspection report
- Review and understand the closing documents
- Bring documents the bank required to approve your loan
- Provide the necessary funds for closing
- Sign all necessary paperwork, including the loan agreement, deed etc.
- Receive keys once documents are signed and funds transferred

AFTER CLOSING DAY

- Duplicate closing documents and secure them in a safe place
- Consider changing locks for added security
- Plan a routine maintenance schedule for your new home

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🌐 www.TheMGroupVA.com



UNDER *Contract* T I M E L I N E

Melanie Lucero

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Congratulations!

USE THIS CHECKLIST TO
ENSURE A SMOOTH CLOSING

SALE PRICE

ESCROW DEPOSIT

ADDRESS

540-870-0714 office
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www.TheMGroupVA.com



Earnest Money Due

Send Contract To Lender

Escrow Deposit Due

Schedule Home Inspection

Submit Loan Application

Complete Home Appraisal

Repair Request Due To Seller

Order Home Insurance

Order Home Warranty

Final Walkthrough

Closing Date



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Final Walkthrough

Closing Date

TITLE COMPANY

COMPANY NAME _____

PHONE _____

ADDRESS _____

SALE PRICE

ESCROW DEPOSIT

PROPERTY ADDRESS

Congratulations!

USE THIS CHECKLIST TO
ENSURE A SMOOTH CLOSING



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UNDER CONTRACT *Timeline*

D A T E

- _____ Earnest Money Due
- _____ Send Contract To Lender
- _____ Escrow Deposit Due
- _____ Schedule Home Inspection
- _____ Submit Loan Application
- _____ Complete Home Appraisal
- _____ Repair Request Due To Seller
- _____ Order Home Insurance
- _____ Order Home Warranty
- _____ Final Walkthrough
- _____ Closing Date

Closing Costs WHO PAYS WHAT

	CASH	FHA	VA	CONV
Downpayment	Buyer	Buyer	Buyer	Buyer
Property inspection	Buyer	Buyer	Buyer	Buyer
Termite inspection (negotiable except on VA)			Seller	
Repairs	Seller	Seller	Seller	Seller
New loan origination fee		Buyer	Buyer	Buyer
Discount points		Buyer	Buyer	Buyer
Document preparation fee		Seller	Seller	Buyer
Credit report		Buyer	Buyer	Buyer
Appraisal		Buyer	Buyer	Buyer
Interest proration on seller's existing loan		Prorate	Prorate	Prorate
Existing loan payoff	Seller	Seller	Seller	Seller
Existing loan payoff demand	Seller	Seller	Seller	Seller
Loan payment penalty (if any)	Seller	Seller	Seller	Seller
Next month PITI payment		Buyer	Buyer	Buyer
Prepaid interest (approx. 30 days)		Buyer	Buyer	Buyer
FHA MIP, VA funding fee PMI premium		Buyer	Buyer	Buyer
Reserve account balance (credit seller/debit buyer)				
Assessments payoff / proration (sewer paving etc.)	Seller			
Taxes	Prorate	Prorate	Prorate	Prorate
Tax impounds	Buyer	Buyer	Buyer	Buyer
Tax service contract		Seller	Seller	Buyer
Fire / hazard insurance	Buyer	Buyer	Buyer	Buyer
Flood insurance (if applicable)		Buyer	Buyer	Buyer
HOA transfer fee	Split	Split	Split	Split
HOA disclosure fee	Seller	Seller	Seller	Seller
Current HOA payment	Prorate	Prorate	Prorate	Prorate
Next month HOA payment	Buyer	Buyer	Buyer	Buyer
Home warranty premium (negotiable)				Buyer
Real estate agents' commission	Seller	Seller	Seller	Seller
Homeowners title policy (negotiable)	Seller	Seller	Seller	Seller
Loan title policy & endorsements		Buyer	Buyer	Buyer
Account servicing set-up fee (negotiable)		Buyer	Buyer	Buyer
Escrow fee	Split	Split	Split	Split
Title insurance (negotiable)	Seller	Seller	Seller	Seller
Recording fee (flat rate)	Split	Split	Split	Buyer
Courier / express mail fees	Split	Split	Split	Split
Wire fees	Split	Split	Split	Split
Email loan documents		Buyer	Seller	Buyer





MELANIE LUCERO & MICHAEL BOYCE

YOUR LOCAL REAL ESTATE PROFESSIONALS

Congratulations!

ON YOUR NEW HOME
AND THE WONDERFUL
MEMORIES IT WILL HOLD!

MOVING DATE



CONTACT INFO

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www.TheMGroupVA.com

MOVING Checklist

2 MONTHS OUT

- Create a budget for moving expenses
- Make an inventory of everything to be moved
- Sort cabinets, closets, and drawers
- Donate any unwanted items
- Book the moving elevator
- Confirm parking arrangement for truck
- Contact insurance company to transfer policies
- Take pictures around the home
- Take photos of electronics before unplugging
- Measure doorways, stairways, and elevators to make sure all your furniture will fit

1 MONTH OUT

- Gather moving supplies
- Contact current services to move or cancel
- Contact services in the new area to set up
- Start packing items that aren't used
- Gather all important documents
- Prepare a list of emergency service technicians and preferred providers

2 WEEKS OUT

- Complete repairs
- Create an inventory of boxes
- Return rentals & borrowed items
- Back up your computer
- Send change of address cards
- Arrange for childcare/petcare
- Pick up dry cleaning & items being repaired

1 WEEK OUT

- Deep clean
- Check the weather channel
- Set an appointment with a locksmith

MOVING DAY

- Do a final walkthrough
- Do a final cleaning
- Dispose of trash
- Put pets in a safe place
- Inform the movers of special instructions

PACK AN ESSENTIAL BOX

- Water bottles & snacks
- Important medications
- Important documents
- Clean sheets
- Toiletries & toilet paper
- Cell phone chargers
- Cash & valuables
- Pajamas, clean clothes, sheets & towels

tips

- ✓ Wrap your fragile items in clothes, linens, and towels instead of bubble wrap
- ✓ Take photos when taking furniture apart
- ✓ Label the boxes in detail, on several sides
- ✓ Cover the openings of your toiletries with saran wrap, then put the tops back on
- ✓ Check if your homeowners' insurance policy covers your stuff when moving



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MOVING DATE



Melanie Lucero & Michael Boyce

YOUR LOCAL
REAL ESTATE AGENT PROFESSIONALS



CONTACT INFO

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Moving CHECKLIST

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1 MONTH OUT

- Gather moving supplies
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MOVING DATE



MICHAEL BOYCE

YOUR LOCAL REAL ESTATE PROFESSIONAL

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CHANGE OF ADDRESS Checklist

HOME SERVICES

- Water and sewer company
- Gas company
- Electrical company
- Telephone
- Cable provider
- Internet provider
- Garbage & recycling
- Pool maintenance
- Home security company
- Residential propane delivery
- Septic system maintenance

GOVERNMENT AGENCIES

- US Postal Service
- Internal revenue service
- Voter registration
- State Department of taxation
- Department of motor vehicles
- Tax commissioner
- Social security administration
- Medicare administration
- Business license office

INSURANCE

- Health insurance
- Life insurance
- Homeowne's insurance
- Car insurance
- Dental insurance

FINANCES

- Banks
- Credit unions
- Loan companies
- Credit card companies
- Student loans
- Financial aid
- Investment broker
- Retail credit account services

COMMUNITY

- Employers
- Schools
- PTA
- Daycare providers
- Church, synagogue etc.
- HOA, condo association etc.
- Charitable organizations
- Country club
- Health club/gym
- Alumni organizations
- Fraternal organizations
- Civic clubs and organizations
- Professional memberships
- Pet groomer
- Community groups

RESIDENTAL SERVICES

- Maid service
- Lawn and garden service
- Pool maintenance
- Pest control

CHANGE OF ADDRESS *Checklist*

Phone

Phone

HOME SERVICES

- ☐ Water and sewer company _____
- ☐ Gas company _____
- ☐ Electrical company _____
- ☐ Telephone _____
- ☐ Cable provider _____
- ☐ Internet provider _____
- ☐ Garbage & recycling _____
- ☐ Pool maintenance _____
- ☐ Home security company _____
- ☐ Residential propane delivery _____
- ☐ Septic system maintenance _____

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- ☐ Credit card companies _____
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- ☐ Financial aid _____
- ☐ Investment broker _____
- ☐ Retail credit account services _____

GOVERNMENT SERVICES

- ☐ US Postal Service _____
- ☐ Internal revenue service _____
- ☐ Voter registration _____
- ☐ State Department of taxation _____
- ☐ Department of motor vehicles _____
- ☐ Local or county tax commissioner _____
- ☐ Social security administration _____
- ☐ Medicare administration _____
- ☐ Business license office _____

INSURANCE

- ☐ Health insurance _____
- ☐ Life insurance _____
- ☐ Homeowner's insurance _____
- ☐ Car insurance _____
- ☐ Dental insurance _____

NOTES



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PRE-INSPECTION Checklist

ELECTRICAL

- No aluminum cable for branch circuits
- Heating/cooling system
- Appears to operate well throughout (good air flow)
- Flues: no open seams, slopes up to chimney connection
- No rust around cooling unit
- No combustion gas odor
- Air filters clean
- Ductwork in good condition
- No asbestos on heating pipes, water pipes or air ducts
- Separate flues for gas/oil/propane and wood/coal
- Visible wiring: in good condition, no "knob-and-tube" wiring, no exposed splices, cables secured and protected
- Service panel: adequate capacity, all cables attached to panel with cable connectors; fuses or breakers are not overheating

MISCELLANEOUS

- No evidence of moisture
- Stairway treads and risers solid
- Stair handrails where needed and in good condition
- Basement or mechanical room
- Insulation at rim/band joists
- Smoke and carbon monoxide detectors were required by local ordinances
- Automatic garage door opener operates properly, stops properly for obstacles
- Exposed foundation; no stains, no major cracks, no flaking, no efflorescence
- Visible structural wood: no sagging, no damage, no decay, no stains, no damage from insects, sills attached to foundation with anchor bolts

PLUMBING

- Water pump: does not short cycle
- Galvanized pipes do not restrict water flow
- Water fixtures functioning properly
- Water heater: no signs of rust, appropriately vented, sized to produce adequate quantities of hot water for the number of bedrooms in the house
- Visible pipes: no damage, no evidence of leaks, no signs of stains on materials near pipes; drain pipes slope slightly down towards outlet to septic/sewage system

KITCHEN

- Built-in appliances operate properly
- No leaks in pipes under sinks
- Floor in cabinet under sink solid, no stains or decay
- Water flow in sink adequate
- Water flow in sink adequate
- Working exhaust fan that is vented to the exterior of the building
- Ground fault circuit interrupter ("GFCI") protection for electrical outlets within 6 feet of the sinks
- Dishwasher: drains properly, no leaks, baskets, door spring operates properly
- No excessive rust or deterioration on garbage disposal or waste pipes
- Cabinets in good condition: doors and drawers operate properly

BATHROOM

- Working fan that doesn't terminate in the attic space
- Adequate flow and pressure at all fixtures
- Sink, tub, and shower drain properly
- Plumbing and cabinet floor in good condition
- Toilet operates properly
- Toilet stable, no rocking, no stains around the base
- Tub or shower tiles secure, wall surface solid
- Caulking in good condition inside and outside of the tub
- No stains or evidence of past leaking around base
- If the sink is metal, it shows no signs of rust, overflow drain doesn't leak

HVAC SYSTEM

- Ridge and fascia board lines appear straight and level
- Sides of house appear straight, not bowed or sagging
- Window and door frames appear square
- Visible foundation in good condition - appears straight, plumb, with no cracks

SAFETY CHECK

- Carbon monoxide detectors
- Adequate outdoor lighting
- Smoke detectors
- Circuit breakers



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PRE-INSPECTION

Checklist

OUTSIDE YARD

- Proper grading drainage away from the house
- No evidence of standing water
- No leaks from septic system (if applicable)
- Yard, landscaping and walkways are in good condition
- No branches or bushes touching house
- No evidence of pest infestation, fungus or rot
- Driveways, sidewalks, patios in good condition
- Downspout drainage directed away from home
- Exterior structures are in good condition
- Railings on stairs and decks are adequate, secure and meet building codes

STRUCTURE

- Ridge and fascia board lines appear straight and level
- Sides of house appear straight, not bowed or sagging
- Window and door frames appear square
- Visible foundation in good condition - appears straight, plumb, with no cracks

EXTERIOR SURFACES

- Siding: no cracking, curling, loose, rot or decay
- Masonry veneers: No cracks, no broken components
- Stucco: No large cracks
- Vinyl siding: no dents, no bowing or loose siding
- No vines on the surface of the structure
- Exterior paint or stain: no flaking or blisters
- No stains on exterior surfaces
- Adequate clearance between ground and wood siding materials (6" minimum); no wood-to-earth contact

ATTIC

- No stains on underside of roofing
- No evidence of decay or damage to structure
- No open electrical splices
- Sufficient and properly installed insulation
- No plumbing, exhaust or appliance vents terminating in attic
- Adequate ventilation, clear path into attic for air entering through soffit vents, adequately sized gable end louvers, all mechanical ventilation operational

ROOF

- Composition shingles: no curling, no cupping, no loss of granulation particulate, no broken, damaged or missing shingles, no more than two layers of roofing
- Wood shingles or shakes: no mold, rot or decay, no cracked/broken/missing shingles, no curling
- Flat roofs: no apparent patches, no cracks, minimal blisters/"alligatoring" and wrinkles, no silt deposits (indicates improper drainage), sealed tar at flashings
- Flashing around roof penetrations
- No evidence of excess roofing cement/tar/caulk
- Soffits and fascia: no decay, no stains
- Exterior venting for eave areas: vents are clean and not painted over
- Chimneys: straight, properly flashed, no evidence of damaged bricks or cracked joints, mortar/cement cap in good condition
- Gutters: no decay or rust, joints sealed, attached securely to structure, no bending or sagging, no sections of gutter or downspout missing, gutters clean, no mud deposits

WINDOWS, DOORS

- Joints around frames are caulked
- Replace damaged screens and windowpanes
- Storm windows or thermal glass used
- Drip caps installed over windows
- Wood frames and trim pieces are secure, no cracks, rot or decay

CRAWL SPACE

- Adequately vented to exterior
- No evidence of insect damage
- No evidence of moisture damage
- Insulation on exposed water supply, waste and vent pipes
- Insulation between crawl space and heated areas, installed with vapor barrier towards heated area

BASEMENT

- No evidence of moisture
- No evidence of water damage to above floor
- Sump pump operates properly



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STAGING Checklist

GENERAL

- Remove all unnecessary items to create space
- Remove all toys, pet bowls crates, etc.
- Deep clean & declutter all areas
- Open curtains and use natural light
- Replace lightbulbs if needed
- Hide bad views with semi-sheer curtains
- Remove any personal photos
- Remove signs of any political or religious preferences & newspapers
- Use fresh flowers
- Clean all mirrors and windows
- Vacuum carpets and polish floors
- Hide remote controls and chargers
- Hide electrical cords and cables
- Turn off & clean ceiling fans
- Remove seasonal decor
- Move furniture around to make room look more spacious

BEDROOMS

- Make all beds and use solid color beddings
- Arrange decorative pillows
- Put away clothing & shoes

EXTERIOR

- Ensure vehicles cannot be seen
- Ensure pool is clean
- Remove all pool toys, cleaners & poles
- Remove weeds & tidy up garden/planted areas
- Place a high quality yard ornament
- Sweep up debris remove all gardening equipments

KITCHEN

- Clear the countertops
- Remove all rugs & towels
- Clear the table
- Hide cleaning supplies
- Remove magnets from refrigerator
- Clean the light-switch plates
- Clean the appliances
- Hide garbage can
- Place a cookbook on the kitchen counter
- Place a bouquet of flowers
- Use simple decoration items

BATHROOMS

- Clear countertops of clutter
- Ensure toilet roll is full
- Remove all toiletries & cleaning supplies
- Hang fresh towels & remove non-matching towels

LIVING ROOM

- Turn off tv & put remotes away
- Organize shelves nicely
- Deep clean & declutter all areas
- Remove all toys/fans/game consoles, etc

DINING ROOM

- Add centerpiece, candles
- Arrange chairs neatly
- Place flowers on table



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HOME IMPROVEMENTS *Checklist*

BEFORE YOU START

- Clearly outline the purpose and objectives of your home improvement project.
- Establish a realistic budget, factoring in materials, labor, permits, and contingencies.
- Conduct thorough research on the project, including materials, techniques, and potential challenges.
- Check local building codes and regulations to determine if permits are needed.
- Identify potential hazards and implement safety measures for the duration of the project.

PLANNING PHASE

- Create detailed plans, sketches, or blueprints that illustrate the project's scope.
- Choose appropriate materials based on quality, durability, and your design preferences.
- If needed, hire experienced contractors or tradespeople and check their references.
- Establish a realistic timeline with milestones and deadlines for each phase.
- Draft a comprehensive contract specifying all project details, costs, timelines, and payment schedules.
- Verify that your contractor carries insurance for the project, including liability and workers' compensation.

DURING THE PROJECT

- Stay informed about daily progress and address any issues promptly.
- Ensure workmanship meets your standards and adheres to the project design.
- Maintain open communication with contractors and tradespeople throughout the project.
- Keep meticulous records of contracts, receipts, permits, and any changes to the original plan.
- Prepare for unexpected delays, material shortages, or other unforeseen challenges.
- Arrange for inspections at critical stages to catch errors or discrepancies early.

FINAL STAGES

- Conduct a thorough inspection of the completed project to ensure it meets your specifications.
- Create a list of any remaining tasks or deficiencies that need attention.
- Ensure all payments are made in accordance with the contract and only after satisfactory completion.
- Discuss warranties for materials and workmanship and create a maintenance plan.
- Arrange for the removal of construction debris and a thorough clean-up of the work area.

AFTER COMPLETION

- Move back into or utilize the renovated area and enjoy the results of your hard work.
- Provide constructive feedback to your contractor for future reference.
- Take time to reflect on the project, noting what went well and what could be improved for the future.



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HOME IMPROVEMENTS *Checklist*

HVAC, ELECTRICAL AND PLUMBING

- Inspect existing HVAC systems for necessary repairs or upgrades.
- Ensure electrical systems are compliant with local codes, and coordinate with licensed electricians.
- Evaluate plumbing systems, addressing any leaks, blockages, or necessary upgrades.
- Schedule professional inspections and maintenance for HVAC, electrical, and plumbing systems regularly.

FRAMING AND DRYWALL

- Verify that framing work aligns with structural plans to ensure long-term integrity.
- Install drywall according to specifications, considering wall and ceiling materials, thickness, and type.
- Apply drywall compound and finish it smoothly, sanding and priming as needed for paint or other finishes.
- Inspect drywall for any imperfections and address them before finishing.

CABINETS & FIXTURES

- Install cabinets, countertops, and fixtures precisely according to design plans.
- Check the functionality of cabinet doors, drawers, and fixtures, making any necessary adjustments.
- Verify that countertops are securely anchored and level.
- Caulk and seal fixtures to prevent moisture penetration and leaks.

DOORS & WINDOWS

- Install doors and windows securely, aligning them with the framing for a snug fit.
- Verify that doors are weatherproofed with proper insulation and sealing.
- Test the functionality of doors, including locks, handles, and hinges.
- Ensure windows are sealed, and they open and close smoothly, addressing any drafts.

FLOORING

- Choose appropriate flooring materials based on the room's function, such as hardwood, tile, or carpet.
- Ensure proper subfloor preparation, including leveling and moisture protection.
- Install flooring materials carefully, adhering to manufacturer guidelines.
- Inspect for evenness, gaps, or inconsistencies and address them before completing the project.

TRIM & FINISH WORK

- Install baseboards, crown molding, and other trim elements meticulously, aligning them with walls and ceilings.
- Fill gaps and nail holes, sand, and finish trim for a polished appearance.
- Double-check that trim work enhances the overall aesthetics of the space.



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HOME MAINTENANCE

Checklist

Spring

- Get your heating system inspected
- Replace the batteries in detectors
- Give your house a deep clean
- Check sprinkler and irrigation systems
- Inspect sidewalks and driveway
- Check seals around doors and windows
- Clean out your gutters
- Powerwash windows, siding & driveway
- Vacuum your refrigerator coils
- Polish wood furniture
- Clear dead plants
- Repair damaged window screens

Fall

- Get your heating system inspected
- Drain and winterize outdoor spigots
- Clean refrigerator and freezer
- Schedule a chimney inspection and cleaning
- Clean your fireplace
- Seal your outdoor surface areas
- Replace your furnace air filter
- Check fire extinguishers & have a safety kit
- Turn off outside hose bibs
- Clean gutters and check roof
- Winterize air conditioning systems
- Flush water heater and remove sediment

Summer

- Clean and repair deck/patio
- Dust the ceiling fan blades
- Inspect plumbing for leaks
- Get your cooling system ready
- Check and clean dryer vent
- Landscape your lawn and garden
- Take care of any insect problems
- Clean your garage
- Check and repair tiles throughout your house
- Clean out window wells of debris
- Check driveway for cracks
- Check the attic for holes
- Deep clean your laundry room

Winter

- Cover outdoor air-conditioning units
- Tighten any handles or doorknobs
- Check all locks and deadbolts
- Remove showerheads and clean
- Check gutters for ice dams
- Trim overhanging tree branches
- Drain and winterize outdoor spigots
- Test smoke and carbon monoxide detectors
- Inspect grout and caulking
- Clean refrigerator and freezer
- Test your sump pump
- Clean drains in sinks & showers
- Run waters and flush toilets



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HOME MAINTENANCE

Checklist

Spring

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- Replace the batteries in detectors
- Give your house a deep clean
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Spring

HOME MAINTENANCE CHECKLIST



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EXTERIOR

- Remove debris and leaves that may have accumulated.
- Check for any damage or loose gutter components.
- Inspect for any damage caused by winter weather.
- Look for missing or damaged shingles.
- Wash windows and replace any damaged screens.
- Check for drafts and reseal if necessary.
- Look for peeling or chipped paint and plan for touch-ups.
- Prune overgrown branches and bushes.
- Remove any dead plants or trees.

INTERIOR

- Schedule professional maintenance for your HVAC system.
- Replace filters.
- Replace batteries and ensure proper functioning.
- Declutter and clean each room thoroughly.
- Donate items you no longer need.
- Check for leaks under sinks and around toilets.
- Ensure water heaters and pipes are in good condition.
- Remove lint buildup to prevent fire hazards.
- Clean refrigerator coils for optimal efficiency.
- Change filters and clean vents.
- Inspect seals around windows and doors.
- Replace any damaged weatherstripping.
- If applicable, schedule a chimney sweep and inspection.

GARDEN

- Trim bushes and trees.
- Fertilize the lawn and garden beds.
- Add seasonal flowers to enhance your curb appeal.
- Clean and inspect outdoor furniture for any needed repairs.
- Consider applying a fresh coat of paint or sealant.
- Check for leaks, adjust sprinkler heads, and set watering schedules.
- Apply a layer of fresh mulch to retain moisture and deter weeds.

Summer HOME MAINTENANCE CHECKLIST



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EXTERIOR

- Remove debris and leaves to prevent clogging.
- Ensure downspouts direct water away from the foundation.
- Inspect for any damage or missing shingles.
- Look for signs of wear and tear.
- Look for peeling or chipped paint and plan for touch-ups.
- Prune overgrown branches away from the house.
- Remove any dead plants or trees.
- Wash windows and replace any damaged screens.
- Check for drafts and reseal if necessary.
- Clean grill grates and check gas lines for gas grills.

INTERIOR

- Schedule professional maintenance for your AC system.
- Replace air filters.
- Replace batteries and ensure proper functioning.
- Check for leaks under sinks and around toilets.
- Ensure water heaters and pipes are in good condition.
- Declutter and clean each room thoroughly.
- Consider rotating seasonal items in storage.
- Ensure proper insulation to maintain a comfortable temperature.
- Look for signs of pests or damage.
- Change HVAC filters and clean vents.
- Reverse the direction for summer cooling.
- Dust and clean fan blades.

GARDEN

- Adjust sprinkler systems based on weather conditions.
- Deep water plants to encourage healthy root systems.
- Mow the lawn regularly at the appropriate height.
- Fertilize as needed.
- Clean and inspect outdoor furniture for any needed repairs.
- Consider applying a fresh coat of paint or sealant.
- Inspect for signs of pests and take appropriate measures.
- Check for wasp nests and address them promptly.
- Check for any loose or damaged boards.
- Clean and apply a fresh coat of sealant or paint.

Fall HOME MAINTENANCE CHECKLIST



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EXTERIOR

- Remove debris and leaves to prevent clogging.
- Check for any leaks and make necessary repairs.
- Inspect for damaged or missing shingles.
- Look for signs of wear and tear.
- Trim branches away from the house to prevent damage.
- Inspect the exterior for gaps and seal with caulk.
- Check for drafts and seal gaps with weatherstripping.
- Drain the water heater to remove sediment.
- Test and ensure the sump pump is working properly.

INTERIOR

- Schedule a professional to service your heating system.
- Replace filters in furnaces.
- Replace batteries and ensure proper functioning.
- Schedule a chimney sweep to remove creosote buildup.
- Apply weatherstripping or use draft stoppers to seal windows.
- Ensure proper insulation in attics and crawl spaces.
- Remove lint buildup to prevent fire hazards.
- Clean coils for optimal efficiency.
- Clean and prepare humidifiers for winter use.

GARDEN

- Clean and store outdoor furniture to prevent damage.
- Drain and turn off sprinkler systems to prevent freezing.
- Aerating allows nutrients to reach the roots more effectively.
- Add seasonal plants to your garden for a burst of color.
- Clean, sharpen, and store garden tools for winter.

Winter HOME MAINTENANCE CHECKLIST



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EXTERIOR

- Remove debris and leaves to prevent clogging.
- Check for any leaks and make necessary repairs.
- Inspect for damaged or missing shingles.
- Look for signs of wear and tear.
- Trim branches away from the house to prevent damage.
- Inspect the exterior for gaps and seal with caulk.
- Check for drafts and seal gaps with weatherstripping.
- Drain the water heater to remove sediment.
- Test and ensure the sump pump is working properly.

INTERIOR

- Schedule a professional to service your heating system.
- Replace filters in furnaces.
- Replace batteries and ensure proper functioning.
- Schedule a chimney sweep to remove creosote buildup.
- Apply weatherstripping or use draft stoppers to seal windows.
- Ensure proper insulation in attics and crawl spaces.
- Remove lint buildup to prevent fire hazards.
- Clean coils for optimal efficiency.
- Clean and prepare humidifiers for winter use.

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- Clean and store outdoor furniture to prevent damage.
- Drain and turn off sprinkler systems to prevent freezing.
- Aerating allows nutrients to reach the roots more effectively.
- Add seasonal plants to your garden for a burst of color.
- Clean, sharpen, and store garden tools for winter.

Inspection CHECKLIST

ADDRESS: _____

DATE: _____

COMPLETED BY: _____

EXTERIOR	Bad	Okay	Good
Back doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Front doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Garage doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Deck, porch, patio	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doorbell	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Driveway	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Garbage receptacle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recycling receptacle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
House numbers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mailbox	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outdoor lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Paint & trim	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sidewalks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sidings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Windows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

YARD	Bad	Okay	Good
Drainage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fences & gates	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retaining wall	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sprinklers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Swimming pool	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ROOF	Bad	Okay	Good
Chimney	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gutters & downspouts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Soffits & Fascia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

STAIRS	Bad	Okay	Good
Floors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Landing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Railing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Treads	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FIREPLACE	Bad	Okay	Good
Blockages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. monoxide detector	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mantle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Soot	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tiles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lining	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

DEN	Bad	Okay	Good
Baseboards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ceiling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ceiling fan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Switches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trim	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Floors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Windows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

HALLWAYS	Bad	Okay	Good
Baseboards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ceiling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Floors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trim	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Closets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Switches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

GARAGE	Bad	Okay	Good
Ceiling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Floors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Storage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Windows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



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Inspection CHECKLIST

KITCHEN	Bad	Okay	Good
Baseboards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ceiling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Floors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trim	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Windows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Switches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cabinets & drawers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Countertops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sink	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dishwasher	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Garbage disposal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Oven	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stove	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Refrigerator	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smoke detectors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
GFCI outlet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

DINING ROOM	Bad	Okay	Good
Baseboards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ceiling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Floors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trim	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Closets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Switches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

UTILITIES	Bad	Okay	Good
Air conditioning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Circuit breakers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Drainage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Water heater	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Furnace	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Main electrical panel	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

LIVING ROOM	Bad	Okay	Good
Baseboards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ceiling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ceiling fan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Floors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trim	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Windows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Switches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

BASEMENT	Bad	Okay	Good
Baseboards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ceiling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Switches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trim	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Floors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Windows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Foundation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stairs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Storage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sump pump	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Washer / dryer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ATTIC	Bad	Okay	Good
Insulation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ladder	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ventilation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

STAIRS	Bad	Okay	Good
Floors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Landing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Railing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Treads	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

NOTES: _____

Inspection CHECKLIST

BEDROOM 1	Bad	Okay	Good
Baseboards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ceiling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ceiling fan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Floors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trim	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Windows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Switches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Closet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

BATHROOM 1	Bad	Okay	Good
Ceiling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Switches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trim	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Floors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Windows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cabinets & drawers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sink	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Toilet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tub / shower	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

BEDROOM 2	Bad	Okay	Good
Baseboards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ceiling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ceiling fan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Floors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trim	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Windows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Switches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Closet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

BATHROOM 2	Bad	Okay	Good
Ceiling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Switches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trim	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Floors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Windows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cabinets & drawers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sink	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Toilet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tub / shower	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

BEDROOM 3	Bad	Okay	Good
Baseboards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ceiling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ceiling fan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Floors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trim	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Windows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Switches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Closet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

BATHROOM 3	Bad	Okay	Good
Ceiling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Switches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trim	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Floors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Windows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cabinets & drawers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sink	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Toilet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tub / shower	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

NOTES: _____

HOME BUYING Checklist

FINANCIAL CHECKUP

- Review your credit score, savings, and overall financial health.
- Consider your down payment, closing costs, and monthly mortgage payments.
- Establish a realistic budget
- Put some money away each month to maintain an emergency fund.
- Consult a mortgage professional to establish your borrowing capacity.
- Gather the required documentation and get pre-approval.

HOUSE HUNTING

- List essential features (must-haves) and desirable features (nice-to-haves) and deal breakers
- Choose an experienced real estate agent to guide you through the process.
- Explore potential neighborhoods, considering factors like schools, amenities, and commute.
- Attend open houses to get a feel for different properties and neighborhoods.
- Work with your agent to schedule private showings for properties that align with your criteria.
- Keep a record of each property visit, noting pros, cons, and potential deal-breakers.
- Analyze recent sales to determine property values for competitive offers.

MAKING AN OFFER

- Analyze recent sales to determine property values for competitive offers.
- Stay informed about market trends and conditions in your target area.
- Collaborate with your agent for a compelling offer, including price, contingencies, and terms.
- Be prepared to negotiate with the seller on price, repairs, or other terms.

OFFER ACCEPTED

- Hire a licensed home inspector to thoroughly evaluate the property's condition.
- Work with your agent to address any issues discovered during the inspection.
- Coordinate and complete home appraisal
- Complete the mortgage application process and secure final loan approval.
- Obtain homeowners insurance coverage to protect your investment.

CLOSING PROCESS

- Gather documents the bank required to approve your loan
- Secure homeowners insurance and provide the details to your lender
- Work closely with the escrow or title company to ensure a smooth closing process.
- Conduct a final walk-through to ensure the property is in the agreed-upon condition.
- Attend the closing, review and sign documents, and get the keys to your new home.

POST-CLOSING PHASE

- Duplicate closing documents and secure them in a safe place
- Coordinate with utility providers to transfer services into your name.
- Organize and plan your move, including hiring movers, if needed.
- Take time to celebrate and settle into your new home. Congratulations!



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HOME SELLING Checklist

CHOOSE A REAL ESTATE AGENT

- Interview multiple agents.
- Check references and reviews.
- Discuss commission rates and marketing strategies.

DETERMINING PRICE

- Understand current market conditions.
- Analyze comparable home sales in your area.
- Get a professional appraisal.
- Consider an initial Comparative Market Analysis (CMA)

PREPARE FINANCIALS

- Calculate your remaining mortgage balance.
- Estimate closing costs.
- Understand potential capital gains taxes.

PRE-LISTING PREPARATIONS

- Remove personal items and excess furniture.
- Deep clean the entire home.
- Fix leaky faucets, broken windows, and damaged flooring.
- Consider repainting walls with neutral colors.
- Mow the lawn, trim bushes, and plant flowers.
- Power wash the exterior and clean the gutters.
- Arrange furniture to maximize space.
- Add finishing touches like fresh flowers or scented candles.
- Hire a professional photographer to take high-quality photos.

LISTING AND MARKETING

- Host open houses and private showings.
- Keep your home tidy and ready for showings at all times.
- Hire a professional photographer to take high-quality photos.

NEGOTIATION AND CLOSING

- Compare offers and consider contingencies.
- Negotiate terms and conditions.
- Sign the purchase agreement.
- Open an escrow account.
- Prepare for the buyer's home inspection.
- Cooperate with the appraiser.
- Address any issues found during the inspection.
- Negotiate any necessary repairs or price adjustments.
- Review the closing statement.
- Schedule the final walkthrough.
- Sign all required documents.
- Transfer keys and property to the buyer.
- Collect your proceeds from the sale.
- Notify utility companies of your move.
- Cancel or transfer services.



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Before our meeting

It's helpful to have the following documents ready:



Property Deed: Proof of ownership of the property.



Appraisal Report: Copy of a previous appraisal to confirm square footage.



Mortgage Information: Details about your current mortgage, including the outstanding balance and terms.



Utility Bills: Average monthly bills for utilities such as water, electricity, and gas.



Homeowner's Insurance Policy: Information about your current insurance coverage for the property.



Home Warranty: If applicable, provide information about any existing home warranty coverage.



Home Inspection Reports: Any recent inspection reports or records of repairs and maintenance done on the property.



Property Tax Records: Documentation showing your property tax history and current assessment.



HOA Documents: If your property is part of a homeowners association, provide relevant documents such as bylaws, covenants, and financial statements.



Renovation Documentation: Records of any renovations, upgrades, or additions made to the property, along with permits if required.

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Before our meeting as a home buyer, it's helpful to know the following:



Preapproval Letter: This shows home sellers that you are qualified for a certain loan amount to buy a house.



Mortgage Options: Familiarize yourself with different mortgage options and understand the financing process.



Your Budget: Plan your post-purchase monthly budget, covering mortgage, insurance, utilities, tax, and recurring expenses like groceries and car payments.



Realistic Expectations: Be realistic about the home buying process, including the timeline, market competition, and challenges.



Neighborhood Research: Research potential neighborhoods to determine which areas align with your lifestyle, commute, and amenities preferences.



Future Plans: Consider your future plans and how they'll affect your home purchase, like job changes, family growth, or investment goals.



Must-Haves and Deal Breakers: Determine your non-negotiables in a home as well as any features or issues that would make a property unsuitable.



Questions to Ask: Prepare questions to ask about the buying process, market conditions, or properties you're interested in.

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SELLER'S AGENT TRANSACTION

Checklist

SELLERS:

CLOSING DATE:

PRE-LISTING

- Research all comparable listed properties
- Prepare home valuation
- Preview other listings
- Compare valuation with other agents
- Prepare all the agreements and disclosures
- Order preliminary title report
- Notify listing agent of incoming offer

LISTING APPOINTMENT

- Discuss client's goals
- Identify improvements at the property
- Familiarize yourself with the neighborhood
- Prepare a comparable market analysis
- Discuss pricing & timing strategy
- Execute paperwork, disclosures & client to do list
- Enroll in a home warranty

POST-LISTING

- Final review of valuation & market activity
- Hire staging company
- Hire photographer or take pictures
- Decide if it's a good client/agent fit
- Execute paperwork, disclosures & client to-do list
- Enroll in a home warranty
- Video tour
- Measure interior of home
- Input all the data into the mls database
- Scan & upload disclosures and contract docs to MLS
- Update any other third party sites
- Upload photos or videos to youtube for seo
- Share on social media pages
- Schedule open house & install yard sign

- Prepare property marketing (flyers, brochures, etc.)
- Promote listing to brokers
- Email market listing to database
- Monitor market changes
- Contact client regarding market changes
- Receive offers from other agents
- Review & compare offers
- Contact buyer's lender & verify buyer's qualifications
- Negotiate and counsel client on offers
- Prepare & calculate estimated net sheets for clients
- Prepare counter offer if applicable
- Execute acceptable contract

UNDER CONTRACT

- Send contract title company
- Update status in MLS & other databases
- Upload contracts & executed disclosure
- Update calendar with all dates and deadlines
- Request or send HOA documents for buyers
- Handle inspection & appraisal requests
- Negotiate inspection & appraisal issues
- Review any title insurance issues
- Present any modifications
- Prepare & schedule closing
- Attend closing
- Verify accuracy of all closing documents

POST-CLOSING

- Upload all docs for brokerage storage requirement
- Follow up with clients regarding move out
- Follow up with other agent regarding move in
- Follow up with clients one week after closing

NOTES:

BUYER'S AGENT TRANSACTION

Checklist

BUYERS:

FINAL WALKTHROUGH:

CLOSING DATE:

ESCROW DEPOSIT DUE:

- Get buyers pre-approved
- Have buyer sign broker rep forms
- Upload pre-approval to client's file
- Go house hunting
- Request sellers disclosure on homes of interest
- Run CMA's on home of interest
- Notify listing agent of incoming offer
- Send to listing agent with 1-4 contract
 - Pre-qual letter and financing addendum
 - Signed sellers disclosure & water district
 - All other applicable addendums
- Download all listing docs from MLS
- Send executed contract to buyers & lender
- Send option money to listing agent
- Send earnest money to title company
- Have buyer schedule inspections
- Order home warranty
- Download MLS pending sheet
- Ask lender about appraisal
- Remind buyers to get home insurance
- Order closing gift
- Follow-up with lender
- Obtain loan conditions
- Obtain loan approval
- Schedule final walk-through
- Remind buyer to transfer utilities
- Confirm lender docs are at escrow
- Get a receipt of lender docs at escrow
- Broker review of documents
- Schedule closing day
- Final walk-through
- Order preliminary closing statement
- Follow-up with lender
- Submit the closing file to broker
- Close file & celebrate!

NOTES:

BUYER'S AGENT TRANSACTION Checklist



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ESCROW DEPOSIT DUE

FINAL WALKTHROUGH

CLOSING DATE

Notes

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- Download all listing docs from MLS
- Send executed contract to buyers & lender
- Send option money to listing agent
- Send earnest money to title company
- Have buyer schedule inspections
- Order home warranty
- Download MLS pending sheet
- Ask lender about appraisal
- Remind buyers to get home insurance
- Order closing gift
- Follow-up with lender
- Obtain loan conditions
- Obtain loan approval
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BUYER'S AGENT TRANSACTION

Checklist



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- Send earnest money to title company
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- Order home warranty
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- Ask lender about appraisal
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- Order closing gift
- Follow-up with lender
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BUYER'S AGENT TRANSACTION *Checklist*

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LISTING MANAGEMENT *Checklist*

NAME: _____

PHONE: _____ **EMAIL:** _____

LIST DATE: _____ **CLOSE DATE:** _____

PRE-LISTING / LISTING

- ☐ Sign a listing agreement & email a copy to seller
- ☐ Confirm property Information
- ☐ Give seller disclosures to fill out
- ☐ Add all necessary docs to MLS
- ☐ Photo / Video date:
- ☐ Share all listing docs & MLS with title company
- ☐ Install lockbox
- ☐ Print home brochures & deliver
- ☐ Create video
- ☐ Give the seller your listing checklist
- ☐ Input listing in MLS
- ☐ Add video to MLS
- ☐ Install sign
- ☐ Add showing instructions for agents
- ☐ Syndicate your listing to the
 - ☐ Realtor.com
 - ☐ Zillow
 - ☐ Trulia

MARKETING

- ☐ Stage the property
- ☐ Capture high-quality photos
- ☐ Film a virtual tour & upload video on Zillow
- ☐ Send the listing to your leads & all area agents
- ☐ Share listing on socials
- ☐ Schedule initial open house
- ☐ Circulate postcards & door hangers
- ☐ Design eye-catching brochures/flyers
- ☐ Post on Craigslist & create a Craigslist ad
- ☐ Put out open house signs
- ☐ Pick up signs the day after open house
- ☐ Follow up (market conditions, feedbacks etc.)

OFFER ACCEPTED

- ☐ Ensure all areas are initialed
- ☐ Ensure addendums & seller disclosure executed
- ☐ Ensure you have preapproval/proof of funds
- ☐ Pending in MLS
- ☐ Send email to the seller including timeline sheet
- ☐ Send email to the other agent, title & lender
- ☐ Ensure other agent has all necessary HOA docs
- ☐ Follow timeline for important dates
- ☐ Obtain escrow receipt
- ☐ Obtain condo doc receipts (3 days)
- ☐ Email seller draft email with inspection info
- ☐ Send commission paid at close form to broker to sign
- ☐ Send commission paid at close form to title co/attorney
- ☐ Ensure the seller is in process or already moved out

DAY OF / POST CLOSING

- ☐ Remove sign / lockbox / any other marketing
- ☐ Order closing gift
- ☐ Mark sold in MLS
- ☐ Send just sold mailer to community
- ☐ Add seller to COI and remain in contact for referrals

Notes: