The Seller's Workbook

Companion forms to How to Sell Your House for Top Dollar

The No-Nonsense Playbook to Price Right, Prep Smart, and Close Fast

Inside this workbook

How to use this workbook

- Each form is a fillable PDF. Type directly into the fields, save, and reuse.
- Print blank if you prefer pen-and-paper. Either way, every form lays out flat for clear notes.
- Use the forms in roughly the order shown — but jump to any one as the deal evolves.

This workbook is informational and not legal or financial advice.

Master Pre-Listing Checklist

Track every prep step before your home goes live on the market.

PROPERTY ADDRESS

TARGET LIST DATE

AGENT NAME

TARGET NET PROCEEDS

Pre-Listing Tasks

Check each item as completed. Add date completed and any notes. Do not list until every essential item is checked.

TASK	DATE COMPLETE	NOTES
☐ Pre-listing inspection ordered with licensed inspector		
☐ Repair quotes collected (2–3 per major item)		
☐ Repairs prioritized via Repair ROI Decision Sheet (Form 3)		
☐ Approved repairs completed and documented		
☐ Staging complete for priority rooms (kitchen, living, master bed)		
☐ Decluttering and depersonalization complete		
☐ Paint touched up; lighting upgraded where needed		
☐ Professional photos scheduled within 48 hours of final prep		
☐ Documents collected (deed, title, utility bills, permits, HOA, manuals)		
☐ Seller disclosures drafted and reviewed		
☐ Agent selected and listing agreement signed		
☐ Net proceeds calculated at 3 price points (Form 6)		
☐ Offer Comparison Worksheet ready (Form 4)		
☐ Listing Readiness Scorecard ≥ 75 (Form 7)		
☐ Inspection Response Templates prepared (Form 5)		

Go-Live Sign-Off

SELLER SIGNATURE	DATE	AGENT INITIALS

Agent Interview Scorecard

14-question rubric. Score each agent 0–3 per question. Compare totals.

PROPERTY ADDRESS

INTERVIEW DATE

Agents Being Interviewed

AGENT NAME / BROKERAGE

AGENT A	AGENT B	AGENT C

Scoring: 0 = poor / no answer, 1 = weak, 2 = good, 3 = excellent. Total possible = 42. Thresholds: 36+ strong hire, 28–35 consider with conditions, <28 pass.

QUESTION	AGENT A	AGENT B	AGENT C
Q1. How do you set the list price? Show the math.			
Q2. Strategy to sell quickly while maximizing net?			
Q3. How will you position our home vs. comps?			
Q4. What makes our property unique; how to market it?			
Q5. How will you collect market feedback after listing?			
Q6. What metrics trigger a price change, and when?			
Q7. Local market experience in our neighborhood?			
Q8. Number sold in our price range; avg sale price?			
Q9. Experience with our property type?			
Q10. Pre-listing prep support, contractor referrals?			
Q11. Marketing channels and timeline to reach buyers?			
Q12. Recommended upgrades, staging, photos, ROI?			
Q13. Listing copy approach for higher-paying buyers?			
Q14. Showings, communication cadence, response times?			
TOTAL SCORE (out of 42)			

Selection Decision

AGENT SELECTED

DATE OF DECISION

RATIONALE / NOTES

Repair ROI Decision Sheet

Quantify every repair: cost, sale-price lift, and net benefit. Stop guessing.

PROPERTY ADDRESS

DATE

How to Use

For each potential repair, enter cost (use lowest reliable contractor quote), estimated sale-price uplift in dollars, and probability of that uplift (0.0–1.0). Calculate Net Lift = Uplift × Probability, then ROI = Net Lift ÷ Cost. Prioritize ROI > 1.0 or any item that removes a deal-killer.

REPAIR ITEM	COST $	UPLIFT $	PROB.	NET LIFT $	ROI	PRIORITY

Decision Summary

TOTAL REPAIR BUDGET APPROVED $

ESTIMATED TOTAL UPLIFT $

OVERALL ROI

ITEMS DEFERRED OR DECLINED (and why)

Offer Comparison Worksheet

Compare up to 3 offers side-by-side. Pick the highest net, lowest risk.

PROPERTY ADDRESS	OFFER DEADLINE

TARGET NET PROCEEDS $	LIST PRICE $	DATE

Side-by-Side Offer Comparison

OFFER FIELD	OFFER 1	OFFER 2	OFFER 3
Buyer name / Agent			
Offered price ($)			
Earnest money ($)			
Down payment / % down			
Loan type (cash, conv, FHA, VA)			
Pre-approval / proof of funds?			
Financing contingency (days)			
Inspection contingency (days)			
Appraisal contingency?			
Seller concessions requested ($)			
Repair credits requested ($)			
Closing date			
Possession (immediate, rent-back)			
Other terms / contingencies			
Estimated NET proceeds ($)			
Risk score (1=low, 5=high)			
Overall rank (1=best)			

Final Decision

OFFER ACCEPTED (1, 2, or 3)	DECISION DATE	COUNTER-OFFER ISSUED?

Inspection Response Template

Three pre-built scenarios. Choose one, fill in items and dollars, send.

PROPERTY ADDRESS ______________________ **RESPONSE DATE** __________

BUYER NAME ______________________ **INSPECTION DATE** __________

Select Response Scenario

Check ONE scenario below. Fill in the matching template. Tie any negotiation language to the inspection report line items.

☐ **Scenario A — Repair OR Credit (offer choice to buyer)**

☐ **Scenario B — Partial Credit Only (decline some requests)**

☐ **Scenario C — Escrow Holdback (work completed post-close)**

Scenario A — Repair or Credit

Thank you. We have reviewed the inspection report. For the item:

____

we propose: (a) repair by a licensed professional within ______ days, OR

(b) a credit of $ ______ at closing. Please indicate preference by ______ .

Scenario B — Partial Credit Only

We can offer a credit of $ ______ for the following specified items:

____

All other requests are respectfully declined. Response required by ______ .

Scenario C — Escrow Holdback

We will complete the following work:

____

within ______ days after closing, with $ ______ held in escrow until completion.

SELLER SIGNATURE ______________________ **DATE** __________

FORM 06 | SELLER'S WORKBOOK

Net Proceeds Calculator

Run the math at three price points before you list. Know what you walk away with.

PROPERTY ADDRESS

DATE

TARGET NET PROCEEDS $ (your goal)

MORTGAGE PAYOFF QUOTE $ (current)

The Formula

Sale Price – (Commission + Closing Fees + Repairs + Concessions + Mortgage Payoff + Buffer) = NET PROCEEDS

Fill in three scenarios: your target list price, a 3% lower scenario, and a 5% lower scenario. Use a 3% buffer on total costs. If projected net is below your target, adjust price, concessions, or repairs.

LINE ITEM	TARGET PRICE	–3% PRICE	–5% PRICE
Sale Price $			
Commission % (e.g. 5)			
Commission $ (auto: price × %)			
Closing / Title Fees $			
Approved Repairs $			
Concessions to Buyer $			
Mortgage Payoff $			
Buffer $ (3% of total costs)			
TOTAL COSTS $			
NET PROCEEDS $ (Sale – Total Costs)			
vs. Target Net (+/–)			

Pricing Decision

RECOMMENDED LIST PRICE $

EXPECTED NET $

MEETS TARGET? (Y/N)

FORM 07 | SELLER'S WORKBOOK

Listing Readiness Scorecard

Score 0–100. Do not list until you reach 75 or higher.

PROPERTY ADDRESS

ASSESSMENT DATE

Score Each Category

Score each category from 0 up to its maximum. Sum to a total out of 100. If total < 75, do NOT list — fix gaps first. Re-score after corrections.

CATEGORY	MAX	YOUR SCORE	NOTES / GAPS
Cleaning & Staging *Deep clean, depersonalized, staged priority rooms.*	25		
Repairs & Minor Fixes *All approved repairs done; touch-up paint; safety items.*	25		
Pre-Listing Inspection *Done by licensed inspector; report reviewed; major items addressed.*	20		
Documents Ready *Disclosures, title info, HOA docs, permits, manuals organized.*	15		
Photos / Virtual Tour *Professional photos, video, floor plan, accurate specs all complete.*	15		
TOTAL READINESS SCORE	**100**		*Sum of all category scores*

Go / No-Go Decision

- ☐ **GO LIVE — Score is 75 or higher**
- ☐ **DELAY LAUNCH — Score below 75; fix gaps and re-score**
- ☐ **CONDITIONAL — List with stated plan to close gaps within 7 days**

SELLER SIGNATURE **AGENT SIGNATURE** **DATE**

FORM 08 | SELLER'S WORKBOOK

Escrow Roadmap

From executed contract to closing day and seller proceeds in hand.

PROPERTY ADDRESS

ESTIMATED CLOSE DATE

ESCROW COMPANY

ESCROW OFFICER / PHONE

The Escrow Timeline

Most California escrows close in 30–45 days. Track each milestone and check it off when complete.

✓	#	MILESTONE	TIMING	WHAT TO EXPECT
☐	1	**Escrow Opened**	*Days 1–3*	Signed contract and buyer's earnest money deposited. Escrow officer sends instructions; title report ordered.
☐	2	**Disclosures & Inspections**	*Days 1–17*	Deliver TDS, SPQ, NHD, and lead-paint disclosures if applicable. Buyer completes inspections; respond to any repair requests.
☐	3	**Appraisal & Loan**	*Days 7–25*	Lender orders appraisal; loan moves through underwriting. Home must appraise at or above contract price; supply info if requested.
☐	4	**Contingencies Removed**	*Days 17–21*	Buyer removes inspection, appraisal, and loan contingencies. Deal is on firmer ground; buyer's deposit is generally at risk if they walk.
☐	5	**Walk-Through & Signing**	*Days 25–29*	Buyer does walk-through; you sign the grant deed before a notary. Review your estimated closing statement carefully before signing.
☐	6	**Funding & Recording**	*Day 30 (Close)*	Buyer's loan funds; deed records at the County Recorder. Once recording is confirmed, the sale is officially closed.
☐	7	**Proceeds Disbursed**	*Day 30–31*	Mortgage(s), liens, commissions, and fees paid off. Net proceeds wired to your bank (1–2 business days) or sent by check.

Deducted from Your Proceeds

- Payoff of existing mortgage(s) and HELOCs
- Real estate commissions (per listing agreement)
- Owner's title insurance (most CA counties)
- Escrow fees (typically split with buyer)
- County transfer taxes & recording fees
- Prorated property taxes & HOA dues
- Negotiated buyer credits or repairs

Tips for a Smooth Close

- Respond to signing requests within 24 hours
- Keep utilities on through the final walk-through
- Confirm wire instructions by phone — never email
- Forward mail; cancel/transfer utilities at close
- Leave manuals, warranties, keys, and remotes
- Save final closing statement for your tax preparer
- Ask early about possession or rent-back if needed

ESCROW NUMBER

EXPECTED NET PROCEEDS

DATE FUNDS RECEIVED