

PAPERWORK PREP CHECKLIST

- ☐ **Property Survey:** Map of your property's boundaries (title company will request, not mandatory). Not applicable for condos/townhomes/villas.
- ☐ **Title Work:** If your home was purchased within the last 3-5 years (title company may request, not mandatory).
- ☐ **Mortgage Documents:** Details the mortgage and balance (title company will need). *IF applicable* share info on any lines of equity, liens, or if PACE program was used.
- ☐ **Warranties and Manuals:** For appliances that will stay with the home (optional).
- ☐ Property **Floorplan** (optional).
- ☐ **FAQ's About the Property:** Most requested Buyer questions. See attached.
- ☐ Fill out **Property Disclosures**. See attached.
- ☐ **Property Features Sheet:** List all builder upgrades and owner upgrades. See attached.
- ☐ **Utility Bills:** Recent bills for electricity, cable/internet, water, gas, etc. These are helpful when filling out the FAQ's Sheet About the Property.
- ☐ **Insurance Records:** Homeowners insurance details and claim history (helpful when filling out the FAQ's Sheet About the Property, Property Disclosures, and might aid Buyer in getting insurance if they are having challenges).
- ☐ **Association Documents:** Articles of Incorporation, bylaws, amendments or supplements if any, current rules, fees, current budget, financials, and FAQ Sheet (all are mandatory if you are selling a condo/ townhome/ villa). And if applicable the Milestone Inspection Report; Structural Integrity Reserve Study; Turnover Inspection Reports (applies to structures that are 3 stories or more with the first floor being habitable). Homeowner can request from the management company or retrieve from community website. I will assist where I can with helping you retrieve these.
- ☐ If you are part of a **HOA or COA** please collect management company's name, property manager's name, phone, and most important email address. Include Master Association information if applicable.
- ☐ 2 Extra **keys** for the lockbox - for house, detached structures, and community pool.
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