

Figure 3.5: Pre-Listing Worksheet

Seller Counseling

Pre-Listing Worksheet

Seller's name _____

Address of property _____

Date of preparation _____

1. Do you have a mortgage on the property? ☐ Yes ☐ No More than one? ☐ Yes ☐ No
 - First mortgage \$ _____ Lender _____
Type: ☐ FHA ☐ VA ☐ FNMA ☐ Other _____
 - Do you have private mortgage insurance (PMI)? ☐ Yes ☐ No With whom? _____
 - Second mortgage \$ _____ Lender _____
 - HELOC balance owed \$ _____ Lender _____
2. Are you current on all loan payments? ☐ Yes ☐ No
 - If no, when was the date of the last payment? _____
 - What is the situation that caused you to miss or will cause you to miss your payments?

3. Have you spoken with anyone at the lender/lien holder's office? ☐ Yes ☐ No
 - Whom? _____ What department? _____
 - What was discussed? _____
4. Are you current on your condo or homeowners' association (HOA) payments?
☐ Yes ☐ No ☐ Not applicable
 - If no, when was the date of the last payment? _____
 - Association name and contact info: _____

5. Are your real estate taxes escrowed? ☐ Yes ☐ No If not, are they current? ☐ Yes ☐ No
6. Is there any legal action pending related to this property of which you are aware? ☐ Yes ☐ No
What notices have you received? _____
Do you have a pending foreclosure sale date? If yes, what is the date? _____
Bankruptcy: Have you filed or do you intend to file for bankruptcy? ☐ Yes ☐ No

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Figure 3.5: Pre-Listing Worksheet (cont.)

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7. Are there any other liens that could affect the sale? ☐ Yes ☐ No

☐ Homeowners' association liens _____


☐ IRS tax liens _____

☐ Mechanics' liens _____


☐ Other liens _____

8. Are there any bills for municipal services that are unpaid? (water, sewer, etc.) _____

9. Who is on title? _____



Seller





Seller


By signing above, we are stating that this information is true and accurate to the best of our knowledge as of this date. We agree to keep our agent informed if any of the above information changes.

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