

Property Walk-Through & Seller Discovery

Class booklet and appointment-ready worksheets

THE PURPOSE OF THE VISIT

- ☐ Understand why the seller is moving and what matters most.
- ☐ Hear the seller describe the home before you assess it.
- ☐ Record property facts, open questions, and the next step.

A SIMPLE VISIT FLOW

- | | |
|--------------------|--|
| 1. Open | Set the agenda and ask what success looks like. |
| 2. Discover | Discuss goals, timing, concerns, and decision makers. |
| 3. Tour | Let the seller lead, then make a systematic pass. |
| 4. Verify | Separate known facts from items requiring documentation. |
| 5. Recap | Repeat priorities and schedule a specific follow-up. |

HOW TO USE THIS KIT

- Page 2: Record seller priorities and discovery answers.
- Page 3: Carry the one-page property walk-through checklist.
- Page 4: Gather property history and document requests.
- Page 5: Plan preparation and the follow-up conversation.

Use the forms as conversation guides. The seller completes their own disclosure forms. Verify records and refer technical questions to qualified professionals.

Seller Discovery Notes

Write the seller's words before deciding what to recommend.

Property address:

Seller name(s) and preferred contact:

GOALS AND TIMING

What is prompting the move?

Where will you go next? What timing works best?

What would make the sale successful?

PRIORITIES

Ask the seller to rank or describe these priorities:

☐ Price

☐ Timing

☐ Convenience

☐ Certainty

Biggest concern or possible obstacle:

Other decision makers or people to consult:

What does the seller want me to handle?

Property Walk-Through Checklist

Seller-led tour first. Then cover the property systematically.

Address / visit date:

FIRST IMPRESSIONS AND EXTERIOR

- | | |
|--|--|
| ☐ Arrival and entry | ☐ Landscaping and yard |
| ☐ Exterior surfaces | ☐ Driveway / parking |
| ☐ Deck / patio / outbuildings | ☐ Drainage observations |

INTERIOR AND UTILITY AREAS

- | | |
|--|---|
| ☐ Living areas | ☐ Kitchen |
| ☐ Bathrooms | ☐ Bedrooms |
| ☐ Storage and closets | ☐ Basement / crawlspace |
| ☐ Attic (if accessible) | ☐ Garage |
| ☐ Mechanical areas | ☐ Lighting / odors / clutter |

SELLER STORY AND PRESENTATION

Favorite features or spaces the seller highlighted:

Buyer questions or presentation concerns to discuss:

Items to confirm later (do not diagnose on site):

Property History & Documents

Ask open questions and note what the seller can provide.

QUESTIONS TO ASK

- ☐ What improvements were made, and when?
- ☐ What repairs or recurring problems should we discuss?
- ☐ Has there been water intrusion, a fire, or another significant event?
- ☐ Were permits or approvals involved in any additions or changes?
- ☐ What fixtures, appliances, or other items will be excluded?
- ☐ Are association rules, shared features, or access issues relevant?

RECORDS TO REQUEST, WHERE APPLICABLE

- | | |
|--|--|
| ☐ Receipts and invoices | ☐ Permits / approvals |
| ☐ Service records | ☐ Warranty information |
| ☐ Improvement dates | ☐ Association documents |

Seller answer or document still needed:

A warranty may have conditions and may not transfer to a buyer. Confirm before saying that it does. Record seller statements accurately and verify material details before marketing the property.

DISCLOSURE REMINDER

Use the brokerage's current disclosure forms and process. The seller answers their own property disclosure questions. Bring uncertain legal or technical issues to the broker or an appropriate professional.

Preparation & Follow-Up Plan

Leave the visit with an agreed next step, owner, and date.

PREPARATION DISCUSSION

Essential items: active problems or obvious obstacles

Presentation items: cleaning, lighting, landscaping, and layout

Optional projects: weigh cost, time, and likely benefit

RECAP AND COMMITMENTS

Seller's top priorities:

Agent will verify / prepare:

Seller will provide / decide:

Next conversation (date, time, and method):

CLOSING PROMPT

"Your priorities are _____. Your preferred timing is _____. Your biggest concern is _____. I will prepare _____, and we will reconnect on _____. Did I get that right?"