

Seller Resource Templates

90-Day Seller Appointment Implementation Kit

Version 1.1 | Last Updated October 2, 2026

Purpose: Create a real homeowner resource using one of four complete editable templates.

Requires: Seller Offer Selection Worksheet Offer selected; Brokerage and data-use permission where required

When to use: Before the landing page and ads

Estimated time: 1–3 hours for one customized resource

[Open the Resource Hub](#)

Customize before using

Replace the fields used in your selected template. Use [AGENT NAME], [BROKERAGE], [CITY], [COUNTY] or [NEIGHBORHOOD], [SELLER OFFER], verified [LOCAL MARKET DATA], [BOOKING LINK], [PHONE] and [EMAIL] consistently. Complete any additional bracketed delivery, privacy, property or review fields that apply. Delete instructions and unused alternatives before sending.

How to produce your homeowner PDF

Open the separate editable Word template for the offer you chose, or use the matching section below. The four standalone templates are linked with Seller Resource Templates in the Hub. Replace every bracketed field. Keep its useful instructions and limits. Add permitted local information; if you lack data, use the checklist instead of inventing market numbers. Save the finished PDF and place it at [RESOURCE LINK]. Use that exact link in Landing Page Copy Template and Seller Follow-Up and Nurture Pack.

Template A Seller preparation checklist

Title: [CITY] Seller Preparation Checklist

Prepared by [AGENT NAME], [BROKERAGE]. Updated [DATE]. Contact [EMAIL] or [PHONE].

Before you choose a listing date, work through these questions. Mark each item Done, To discuss, or Not applicable.

- Define your preferred moving window and the dates you cannot change. Write [TARGET MONTH] and [CONSTRAINTS].
- Gather mortgage payoff information, property tax details, HOA or condominium documents where relevant, and records of repairs or improvements. Ask the relevant institution for current figures.
- Ask your agent which disclosures and documents are required in your state. Do not use a checklist as a substitute for the required forms.
- Note roof, HVAC, plumbing, electrical, and other known condition issues. Decide which require specialist advice. Do not conceal known defects.
- Walk through the home and identify inexpensive cleaning or presentation work you can actually complete. Discuss larger projects before paying for them.
- Review comparable sales with attention to condition, size, location, and date. A nearby asking price alone does not establish market value.
- Request an estimate of seller proceeds showing payoff, negotiated compensation, concessions, closing expenses, and uncertainty. Ask the provider to explain each line.
- Plan showing access, pets, valuables, occupancy, and the move. Keep private documents out of photographs.
- Agree on a pricing-review date and how feedback will be discussed once the property is listed.

Your next decision: Which two items could change your timing or expected proceeds? Write them here: [ITEM 1] and [ITEM 2].

Want help applying this to your property? Book a no-obligation selling-plan conversation at [BOOKING LINK]. You can use this checklist without booking. Requirements vary by property and state; confirm them with your agent, brokerage, and relevant professionals.

Template B Local seller guide

Title: A Practical Guide to Selling a Home in [CITY / COUNTY]
Prepared by [AGENT NAME], [BROKERAGE]. Updated [DATE].

Step 1 Set your timing. Write your preferred move date, any financing or purchase dependencies, and your flexibility. Ask how preparation, marketing, negotiations, and closing could affect that plan. No sale date is guaranteed.

Step 2 Understand the property's position. Compare recent relevant closed sales, current competing listings, and the home's condition. Ask why each comparable was chosen. Asking prices and completed sales answer different questions.

Step 3 Choose work with a purpose. Make a list of essential repairs, optional presentation improvements, and projects requiring professional advice. Discuss cost and likely usefulness before committing.

Step 4 Review the listing plan. Ask where the property will be advertised, how photographs and showings will be handled, how inquiries will be answered, and how you will receive feedback. Agree on responsibilities and review dates.

Step 5 Compare offers beyond the headline price. Review financing, contingencies, timing, concessions, and uncertainty with the appropriate professionals. Ask for a written estimate of your proceeds under the actual offer terms.

Step 6 Prepare for closing. Your state, contract, title provider, lender, and property circumstances determine the required steps. Keep deadlines and documents in one place, and verify wire instructions through a trusted known contact.

Local information to complete: [PERMITTED DATA SOURCE], [DATA PERIOD], [CITY], [SPECIFIC LOCAL PROCESS ITEMS]. If none is available, remove this paragraph rather than leaving an implied local market claim.

Questions to bring to a consultation: What could affect my timing? Which comparable sales are relevant? What costs am I overlooking? What would trigger a pricing review?

Optional next step: [BOOKING LINK]. Contact [PHONE / EMAIL]. This guide is general education and does not replace legal, tax, disclosure, or transaction advice.

Template C Property pricing review

Title: Pricing Review for [PROPERTY ADDRESS]
Prepared for [SELLER FIRST NAME] by [AGENT NAME], [BROKERAGE]. Analysis date [DATE].

Property facts: [TYPE], [LIVING AREA AND SOURCE], [BEDS / BATHS], [LOT], [CONDITION PROVIDED], [KNOWN FEATURES], [ITEMS NOT VERIFIED].

Purpose: Discuss an evidence-based listing range and the factors that could change it. This is an agent's comparative analysis, not an appraisal or guaranteed sale price.

Comparable	Status and date	Price	Size and condition	Relevance and differences
[PERMITTED COMP 1]	[CLOSED / ACTIVE, DATE]	[PRICE]	[FACTS]	[REASON SELECTED]

Comparable	Status and date	Price	Size and condition	Relevance and differences
[PERMITTED COMP 2]	[CLOSED / ACTIVE, DATE]	[PRICE]	[FACTS]	[REASON SELECTED]
[PERMITTED COMP 3]	[CLOSED / ACTIVE, DATE]	[PRICE]	[FACTS]	[REASON SELECTED]

Data source and usage permission: [SOURCE / LICENSE OR PERMISSION]. Date range [FROM / TO]. Do not reproduce restricted MLS details or images without permission.

Suggested discussion range: [LOW] to [HIGH], subject to [INTERIOR REVIEW / MATERIAL CONDITION / NEW MARKET DATA]. Explain how you reached the range: [REASONING]. Do not populate a range without analysis.

Current competition: [RELEVANT LISTINGS AND DATE]. Distinguish asking price from closed price.

What would change this review: [CONDITION FINDINGS], [NEW COMPARABLES], [SIGNIFICANT MARKET CHANGE].

Next decisions: [PRICING DISCUSSION], [PREPARATION PRIORITY], [TIMING]. Optional consultation [BOOKING LINK].

Template D Recent sales report

Title: Recent Home Sales in [CITY]

Prepared by [AGENT NAME], [BROKERAGE]. Updated [DATE].

Scope: [PROPERTY TYPE], [GEOGRAPHY], [FROM-TO], [SAMPLE SIZE]. Source [PERMITTED SOURCE], retrieved [DATE]. Use the same scope for all comparisons.

Measure	Value	What it covers
Closed sales	[COUNT]	[EXACT SCOPE]
Median closed price	[VALUE]	Median of the stated closed-sale sample
Typical market time if supported	[VALUE / NOT AVAILABLE]	[SOURCE DEFINITION]
Prior comparable period	[FROM-TO]	[SAME SCOPE OR EXPLAIN CHANGE]

What this suggests: [PLAIN INTERPRETATION THE DATA ACTUALLY SUPPORT]. If the sample is small or the scope changed, explain that limitation. Do not claim a property value or certain future trend from an area median.

What it does not tell you: Your home's condition, specific comparable selection, negotiated costs, and actual buyer demand for your property still need review.

One practical seller action: [ACTION LINKED TO THE EVIDENCE].

Want to discuss the relevant comparables for your home? [BOOKING LINK]. Contact [PHONE / EMAIL].

Final customization check

- Remove every unused template and all unfilled placeholders from the homeowner copy.
- Identify the actual agent and brokerage and add required local advertising disclosures.
- Confirm the promised delivery time and any data or image permissions.
- Label a pricing analysis accurately; do not call it an appraisal.
- Open the exported PDF and the download link on mobile.

- Deliver the resource even if the homeowner does not book.

You are done when

One template is customized, reviewed, saved as a homeowner PDF, and available at a working download link.