Listing Appointment Checklist

Doorlark Editorial Team · doorlark.com/tools/listing-appointment-checklist/ · General information, not legal advice. Use your state's forms and follow your broker's process.

48 hours before

- ☐ Pull the deed and tax record. Confirm every owner's name, the legal description and the parcel number. Everyone on title has to sign.
- ☐ Check the listing history: past MLS entries, days on market, price changes, and why it didn't sell if it was listed before.
- ☐ Look up permits on file for additions, finished basements, decks and system replacements. Unpermitted work tends to surface in disclosures and appraisals.
- ☐ Note the year built. For homes built before 1978, federal law requires the lead-based paint disclosure and the EPA pamphlet before the buyer is bound by a contract.
- ☐ Check the FEMA flood map, and read your state's seller disclosure form so you know what the seller will be asked.
- ☐ If there's an HOA, find the manager, the dues, any transfer or resale certificate fees, and the rental and sign rules.
- ☐ Build the CMA: closed comps, the active competition and recent expireds. The CMA template walks through it.
- ☐ Run a net sheet at three prices: your recommended list price, 3% under and 5% under.
- ☐ Send a short email before you go: when you'll arrive, how long it takes, and what to have ready (next section).

Ask the seller to have ready

- ☐ Lender names and approximate payoffs for each loan, plus any HELOC or lien.
- ☐ Survey, any past inspection or appraisal, and warranties for the roof, systems or appliances.
- ☐ Average utility bills, HOA documents, and the dates of major updates (roof, HVAC, water heater, windows).
- ☐ What stays and what goes: fixtures, appliances, window treatments, mounted TVs, sheds.
- ☐ Their timeline: where they're going, whether they need to buy first, and any dates that can't move.

What to bring

- ☐ Your brokerage's listing agreement and every disclosure and agency form your state requires.
- ☐ The lead-based paint disclosure and EPA pamphlet if the home was built before 1978.
- ☐ The CMA, three net sheets, and a marketing plan with dates (photos, coming soon if your MLS allows it, live date, first open house).
- ☐ Sample listing photos and one of your past listings' MLS sheets.
- ☐ A one-page explanation of how buyer-agent compensation works now, and your brokerage's form for recording the seller's decision.

At the appointment

- ☐ Walk the house first and listen. Ask what they love about it and what they'd fix if they were staying.

- [ ] Ask the disclosure questions out loud: leaks, insurance claims, foundation, pests, known defects, open permits. Write the answers down.
- [ ] Ask about cameras and doorbells that record audio. Some states restrict recording conversations without consent, so sellers should check the rules before showings start.
- [ ] Go through the CMA, then the net sheets. Agree on a price, and on what happens if there are no offers in 14 to 21 days.
- [ ] Say that commissions aren't set by law and are fully negotiable, then cover your fee and what it includes.
- [ ] Cover buyer-agent compensation. Offers of compensation can't go on the MLS. If the seller decides to offer compensation to buyer brokers off the MLS, disclose it in writing and get the seller's written approval first.
- [ ] Explain concessions. A seller can advertise buyer closing-cost help on the MLS, and buyers can ask for credits in offers, within their loan's limits.
- [ ] Agree on showing instructions: notice needed, pets, lockbox, and times that don't work.
- [ ] Plan marketing that describes the home, not who should live there. That keeps the listing fair-housing safe.

Within 24 hours after

- [ ] Send the signed agreement, the disclosures and the net sheet you agreed on, in one email.
- [ ] Book photos, the floor plan and the sign install. Send the seller the prep list for photo day.
- [ ] Check your MLS's rule on how soon a listing must be entered once public marketing starts, and put that date on your calendar.
- [ ] Write the MLS remarks from facts, and check every fact against the public record and the seller's answers.
- [ ] Pick a weekly update day and tell the seller which day it is.

Seller notes

Fill in at the appointment.

Seller name(s) on title	
Property address and parcel #	
Year built (before 1978?)	
Mortgage payoffs and liens	
Updates and their dates	
Known issues disclosed	
What conveys	
Target move date	
Agreed list price	
Price review date	

Commission and buyer-agent compensation

Listing fee agreed	
Seller's decision on buyer-broker compensation (in writing)	
Buyer concessions to advertise, if any	