

Move at a Glance

Everything about the move in one place. Keep this page at the front of your binder.

Move

Moving from

Moving day

Moving to

Keys / possession date

People and companies

Mover or truck rental

Helper in charge on the day

Landlord / agent / buyer

Emergency contact

Why I am moving and what I want from the new place

What matters most about this move

Key date	What happens	Done
Notice to landlord or listing date		
Last day at old place		
Utilities off / on		
Cleaning		

Selling Snapshot and Goals

The property

Address

Year built

Bedrooms / baths

Mortgage lender (name only)

Type / size

Lot size

Owner name(s)

Any liens or HOA?

Timing

Why we are selling

Ideal list date

Ideal closing date

Move-out deadline

Where we will live next

Contingent on buying?

Priorities (rank 1-4)

Highest price

Speed of sale

Low hassle

Certainty of closing

What we love about this home (for the listing story)

What a buyer might question, and our plan

Our non-negotiables and flexible points

BUYERS

Buyer: Get Your Finances Ready

✓ Do

- ✓ Check your credit reports for errors and fix any you find
- ✓ Get pre-approved by a lender before you shop seriously
- ✓ Decide your own comfortable budget, not just the maximum approved
- ✓ Count ongoing costs: taxes, insurance, repairs, utilities, dues
- ✓ Save for closing costs and moving, not just the down payment
- ✓ Keep documents handy: pay records, statements, tax forms

✗ Don't

- ✗ Take on large new debts or open new credit before closing, unless your lender says it is fine
- ✗ Change jobs or move big sums around without asking your lender first
- ✗ Shop only by the monthly payment; check the total cost
- ✗ Treat pre-qualification and pre-approval as the same thing
- ✗ Skip an emergency fund after buying
- ✗ Hide anything from your lender

My numbers (fill in)	Amount	Notes
Down payment available		
Closing costs I expect (ask lender for an estimate)		
Comfortable monthly housing payment		
Monthly costs beyond the loan		
Emergency savings after closing		

Questions for my lender
