

STREAMLINE YOUR MOVE-OUT-IN PROCESS

SELL + BUY PLANNING WORKSHEET

Ensure a Smooth Transition and Leave Nothing Behind

BEFORE YOU MOVE OUT:

Step 1: Define Your Goals

- Where do you want to move?
- Whats your ideal timeline?
- Whats your price range for the next home?

Step 2: Know Your Numbers

- Estimated equity from your sale
- Pre-approval for purchase
- Estimated costs for both transactions

Step 3: Timing It Right

- Will you need a rent-back?
- Are you comfortable with a temporary rental?
- Can you negotiate a simultaneous close?

Step 4: Create a Backup Plan

- What happens if one leg of the deal delays?
- Plan moving logistics
- Budget for short-term storage if needed

Reminders

STREAMLINE YOUR MOVE-OUT PROCESS

MOVE-OUT CHECKLIST

Ensure a Smooth Transition and Leave Nothing Behind

BEFORE YOU MOVE OUT:

- ✓ Schedule utility turn-off for the day after closing.
- ✓ Cancel cable, internet, phone, maintenance, lawn service, and security systems
- ✓ Forward mail to new address.
- ✓ Inform children's schools.
- ✓ Update homeowner's insurance policy with the new address.
- ✓ Update address with bank, mortgage, and loan accounts.
- ✓ Notify credit card companies and financial institutions of address change
- ✓ If taxes and insurance are escrowed update the forwarding address for your refund check
- ✓ Transfer or cancel memberships/subscriptions tied to current address (gym, clubs, magazines, etc.).
- ✓ Transfer medical records to new healthcare providers if needed.
- ✓ Empty sheds and attic.
- ✓ Leave house/appliance manuals.
- ✓ Leave a note for new buyers with useful information: alarm code, neighbor names, HOA contact, door codes, maintenance contacts (AC, lawn, etc.).
- ✓ Securely pack and label boxes for easier unpacking.
- ✓ Ensure home is swept clean, empty, and trash-free.

Items That WILL Remain With The Property:

CLOSING DAY REMINDERS:

- ✓ All agreed-upon repairs should be done 5 days prior to closing.
- ✓ Set aside important documents, such as property deeds, titles, or other legal paperwork, to bring to the closing.
- ✓ Send me a copy of all repair receipts and bring a copy to closing.

Things to bring to Closing:

- ✓ Your government-issued ID (driver's license, passport, etc.) **Can't be expired**
- ✓ Any keys, remotes, garage doors openers, or access codes for the property
- ✓ Bring a checkbook in case there are incidentals that need to be covered
- ✓ Any receipts or documentation for repairs or other agreements made during the selling process

ONCE AT YOUR NEW HOME:

- ✓ Set up utilities and schedule installation if needed.
- ✓ Arrange internet, cable, and phone services for your new home.
- ✓ Notify employer, schools, and relevant institutions of your address change.
- ✓ Update driver's license and vehicle registration with new address.
- ✓ Register to vote using your new address.
- ✓ Find local healthcare providers and transfer medical records.
- ✓ Update address with insurance providers for home coverage.
- ✓ Familiarize yourself with community rules and HOA regulations.
- ✓ Set up mail forwarding at the post office.
- ✓ Change or rekey locks for enhanced security.
- ✓ Unpack and organize essential items first.
- ✓ Conduct a thorough cleaning, focusing on bathrooms and kitchen.