

PROJECT CONNECTIONS / PLANNING SERIES 01

# Prepare the property. Plan the next move.

## Home Sale Preparation Planner

Decide what to address, document and leave for the buyer. Organize preparation without assuming a full renovation is needed.

PRINT-READY WORKBOOK / 14 PAGES

Illustrative scene; not an identified SJBA member project.

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# Your selling-stage snapshot

Start with the decision you need to make, then use the pages that support it. Review the plan whenever the destination, condition information or transaction dates change.

**STARTING POINT / Exploring • Preparing • Listing • Under agreement**

**Target outcome: what must be ready, and how will you measure it?**

**Decision owner, other participants and target date**

**Current stage and the dependency most likely to change your timing**

## Use the workbook in three passes

Gather facts and constraints / pages 3-6

Compare and coordinate / pages 7-10

Confirm next steps / pages 11-14

Track progress in the action plan on page 13. Keep completed worksheets private; no online submission is required.

# Make the household timeline work

Choose a realistic sequence for preparation, listing and moving. Ask your real estate professional which dates are preferences and which become obligations under your agreement.

**Where will the household go next? What must be confirmed there first?**

**What possession or move-out arrangements need professional advice?**

**Which cash or scheduling constraints limit preparation work?**

**What is the fallback if the next home or buyer timing changes?**

Bring your calendar and existing commitments to the first planning conversation.

# Build the condition record

Record what you know and where that information came from. A receipt shows work was invoiced; ask whether further assessment is needed to understand the current condition.

| Area or record | Known facts / evidence | Question / assessor |
|---|---|---|
| Roof / exterior | | |
| Water / drainage history | | |
| Heating / cooling | | |
| Electrical / plumbing | | |
| Prior repairs / permits | | |
| Other known concern | | |

**Most important unresolved question / next action**

Attach dated reports and receipts. Record unknowns without diagnosing them.

# Address, assess, document or defer

For each issue, choose a next step based on evidence, timing and professional advice. Deferring work does not mean concealing a known problem or omitting required information.

| Issue / evidence | Choice / reason | Quote / owner / next step |
|---|---|---|
| Issue 1 | | |
| Issue 2 | | |
| Issue 3 | | |
| Issue 4 | | |

**Most important unresolved question / next action**

A useful decision states why, who approved it and what happens next. Ask your legal or real estate adviser how to handle disclosure.

# Prepare the property information

Gather records before completing transaction forms. Let qualified legal and real estate professionals confirm the forms, statements and local requirements that apply to your sale.

**Which known conditions and past repairs need to be discussed or documented?**

**Which ownership, permit, warranty or service records are missing, and who will obtain them?**

**What disclosure and transfer requirements apply to this property and transaction?**

**Who will review the completed information, and when?**

Keep original records secure. This workbook is not a disclosure form or legal determination.

# Set a preparation spending limit

Use written quotes and separate preparation from moving and transaction costs. Consider a lower-spend alternative before authorizing an improvement solely for presentation.

| Cost / responsibility | Estimate | Confirmed | Source / date |
|---|---|---|---|
| Cleaning / organizing | $ | $ | |
| Necessary repairs | $ | $ | |
| Professional assessments | $ | $ | |
| Presentation / photography | $ | $ | |
| Moving / storage | $ | $ | |
| Transaction expenses | $ | $ | |
| Owner-held reserve | $ | $ | |

**Decision owner / spending limit / next review date**

Total planned: $_____ Confirmed funds: $_____ Uncommitted balance: $_____

# Compare the actual work offered

Give each provider the same task description. A smaller price may reflect a smaller scope, exclusions or an unfinished handoff rather than better value.

Option / provider A: _____ B: _____

| Comparison point | A / evidence | B / evidence |
|---|---|---|
| Included work and finish level | | |
| Excluded work / assumptions | | |
| Written price / payment stages | | |
| Access and disruption | | |
| Proposed start / completion | | |
| Evidence / warranty / cleanup | | |

**Recommendation / information needed before choosing**

Chosen approach and reason: _____

# Prepare rooms for practical use

Focus on usable space, cleanliness and access. Decide how to store personal items securely and which preparation tasks can wait until condition questions are resolved.

| Room / zone | Task / safe storage | Owner / completion date |
|---|---|---|
| Entry / circulation | | |
| Living areas | | |
| Kitchen | | |
| Bedrooms / work areas | | |
| Bathrooms | | |
| Exterior / storage | | |

**Most important unresolved question / next action**

Do not cover a defect to make it less visible. Refer condition questions back to the record on page 4.

# Sequence the professional handoffs

Ask one person to maintain the master calendar. Confirm that assessments and repairs are resolved before photography or listing dates depend on them.

### Real estate professional

Define market-preparation priorities and listing readiness.

Owner: _____ Due: _____ Received by: _____

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### Inspector / relevant trade

Document concerns and recommended next action.

Owner: _____ Due: _____ Received by: _____

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### Repair / cleaning providers

Finish agreed scope and return records.

Owner: _____ Due: _____ Received by: _____

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### Photographer / real estate professional

Confirm preparation is complete before scheduling.

Owner: _____ Due: _____ Received by: _____

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### Attorney / moving provider

Coordinate transaction questions and possession needs.

Owner: _____ Due: _____ Received by: _____

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Record each handoff: deliverable, receiving person, due date and confirmation.

# Keep showings and daily life manageable

Agree on showing access and secure communication routines with the real estate professional. Keep household needs visible while protecting documents and personal information.

**What notice, access and household routine will be agreed for showings?**

**Who manages pets, valuables, personal documents and secure storage?**

**Which trusted contact will confirm unexpected requests or changed instructions?**

**How will you keep transaction records and preparation tasks current?**

Independently confirm payment instructions with a known contact before acting on a changed message.

# Plan your professional conversation

Bring your condition record, preparation limit and household calendar. Explain the decision you need help making; ask the professional to separate recommendations from facts already established.



## BETTER QUESTIONS. CLEARER NEXT STEPS.

Bring the relevant worksheets to your professional conversation. Record the recommendation, who owns the next action and when to follow up.

Illustrative scene; not an identified SJBA member project.

Real estate: which preparation affects readiness, and what can reasonably wait?

Trade / inspector: what needs assessment before a cosmetic task proceeds?

Legal adviser: which documents or disclosure questions remain unresolved?

**Role / contact / meeting date and documents to bring**

**Recommendation received / assumptions to confirm**

**Next action / owner / deadline / follow-up date**

Proposed roles are not a claim that every role has a current SJBA member.

# Listing-readiness action plan

Choose proceed, revise or investigate after reviewing your records. Listing readiness should reflect the agreed plan and unresolved issues, not simply the completion of cosmetic work.

**READINESS CHECK / mark confirmed or name the unresolved issue**

☐ Condition questions have an owner

☐ Documents reviewed by the appropriate adviser

☐ Preparation spending approved

☐ Household and possession plan workable

Decision: proceed / revise / investigate / pause | Date: _____

**PRIORITY 1 / Action: _____**

Owner: _____ Due: _____

Dependency / evidence needed: _____

Progress / next review: _____

**PRIORITY 2 / Action: _____**

Owner: _____ Due: _____

Dependency / evidence needed: _____

Progress / next review: _____

**PRIORITY 3 / Action: _____**

Owner: _____ Due: _____

Dependency / evidence needed: _____

Progress / next review: _____

Review weekly during preparation and whenever a material condition or transaction date changes.

# Sources and your next connection

Use these primary resources with the relevant professional. Source checks: October 14, 2026. Blue underlined titles are clickable; [S#] references point to this list.

**[S1] NJ DCA | Construction permit resources**

Confirm project-specific permits and inspection questions with the local enforcing agency.

**[S2] NJ Consumer Affairs | Hiring a contractor**

Compare written bids and check relevant registration, credentials and references.

**[S3] FMCSA | Moving checklist**

Interstate moving: compare written estimates, verify registration and retain moving documents.

**[S4] NJ Consumer Affairs | Public movers FAQ**

For moves within New Jersey, verify state licensing and the written service and coverage terms.

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General educational planning information, not individualized legal, financial, insurance, clinical, engineering or construction advice. Requirements vary. Qualified professionals and relevant authorities should confirm applicable decisions.

## Need professional guidance?

Explore current professionals in the SJBA directory. Bring the relevant worksheet and explain the decision you need help making. Not every role listed is necessarily represented; verify scope, credentials and availability.

### About the South Jersey Business Association

Founded in 1994, SJBA is a structured, performance-driven, category-exclusive referral network for serious South Jersey business owners. Its trust-based professional relationships can help residents and business owners identify relevant expertise. SJBA does not guarantee member work or results.

Established business owner? Explore a meeting visit.
Visit the SJBA website for current information.