

SELLERS | CONDO

ONBOARDING QUESTIONNAIRE



Please take a moment to answer the following questions to help us deliver an extraordinary selling experience that exceeds your expectations.

DATE:

CLIENT NAME(S):

CURRENT ADDRESS:

PHONE/EMAIL:

PREFERRED TIME AND METHOD OF CONTACT:

ON A SCALE OF 1 TO 10, HOW READY DO YOU FEEL TO LIST YOUR HOME:
(1 = Just starting to explore, 10 = Fully ready to sell)

PLEASE TELL US A BIT ABOUT YOU

YOUR BIRTHDAY(S)... SO WE CAN CELEBRATE WITH YOU:

FAVORITE RESTAURANT:

FAVORITE FOOD/DRINK:

FAVORITE ACTIVITY:

SOCIAL HANDLES:
(share only what you feel comfortable with)

YOUR CURRENT HOME

WHAT ARE YOUR CONDO'S TOP FEATURES:

YOUR CURRENT HOME (CONTINUED)

PLEASE LIST RECENT IMPROVEMENTS (COSMETIC AND MECHANICAL), INCLUDING THE YEAR COMPLETED:

WHAT DO YOU LIKE MOST ABOUT YOUR HOME? WHAT SHOULD A BUYER KNOW:

WHAT IS YOUR FAVORITE ROOM OR SPACE IN YOUR HOME? WHY:

IF YOU WERE TO STAY IN YOUR HOME FOR ANOTHER FIVE YEARS, WHAT WOULD YOU CHANGE OR IMPROVE:

LOOKING AT YOUR HOME THROUGH THE EYES OF A BUYER, HOW WOULD YOU RATE ITS CONDITION ON A SCALE OF 1-10? (1 = POOR; 10 = MODEL):

WHAT WOULD IT TAKE TO MAKE YOUR HOME A 10:

DO YOU HAVE ANY EXCLUSIONS:

WHAT DO YOU LIKE MOST ABOUT YOUR NEIGHBORHOOD? WHAT ARE YOUR FAVORITE PLACES TO VISIT:

WHAT ARE YOUR 2024 TAXES? DO YOU HAVE ANY EXEMPTIONS? HAVE YOU PURSUED ANY APPEALS:

WHAT ARE YOUR GAS AND UTILITY COSTS (MONTHLY AVERAGE)? PLEASE PROVIDE YOUR COMED AND PEOPLE'S GAS ACCOUNT NUMBERS:

WHAT IS YOUR PARKING SPOT NUMBER? STORAGE LOCKER? PLEASE PROVIDE LOCATIONS:

ANY OTHER HIGHLIGHTS WORTH NOTING:

WHAT IS THE NAME OF YOUR HOA GROUP (IF SELF-MANAGED, PLEASE INDICATE)? PLEASE ALSO PROVIDE CONTACT INFORMATION FOR YOUR HOA PRESIDENT (NAME, EMAIL, PHONE):

WHAT IS YOUR MONTHLY ASSESSMENT AND WHAT DOES IT COVER:

WHAT ARE YOUR BUILDING'S/ASSOCIATION'S RESERVES:

HOW IS YOUR ASSOCIATION MANAGED? IS THERE A MAINTENANCE SCHEDULE SHOWING PROACTIVE MAINTENANCE WORK:

WHAT RECENT PROJECTS HAVE BEEN COMPLETED:

WHAT PROJECTS MAY BE ON THE HORIZON:

WHAT IS YOUR BUILDING'S/ASSOCIATION'S SPECIAL ASSESSMENT HISTORY? ANY PLANNED ASSESSMENTS:

IS YOUR ASSOCIATION HANDLING INCREASE IN TAXES:

WHAT IS BUILDING'S PET POLICY? RENTAL POLICY? WHAT IS THE CURRENT OWNER OCCUPANCY:

WHAT IS THE MOST VALUABLE SERVICE WE CAN PROVIDE TO YOU THROUGHOUT THIS PROCESS:
(examples: exclusive vendor access, prompt and proactive communication, expert guidance or something else)