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Partnering for Living Solutions

Property Transition Readiness Checklist

Assess your property and determine the best course of action with this practical checklist.

Inspection and Condition

- Conduct a thorough inspection of the property
- Identify necessary repairs and updates
- Estimate repair costs and timelines
- Evaluate the property's overall condition

Financial Considerations

- Determine the property's current market value
- Review mortgage balance and terms
- Calculate potential net proceeds from sale
- Compare costs of selling vs. keeping or renting

Ownership Status

- Confirm the title is clear and in your name
- Settle any outstanding property taxes or liens
- Review homeowner association (HOA) rules
- Consider legal and tax implications of selling or transferring

Market Assessment

- Research the local real estate market
- Analyze recent sales of comparable properties
- Understand current buyer demand and trends