

Disposition Planning Checklist

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Initial Assessment & Goals

Establishing the foundation for the disposition plan. Includes defining objectives, understanding the asset's current status, and identifying potential challenges.

Property Identification & Description

Write something...

Current Estimated Value (Initial)

Enter a number...



Primary Reason for Disposition

Write something...

Disposition Goals (Select all that apply)

- ☐ Maximize Net Proceeds
- ☐ Minimize Tax Liability
- ☐ Timely Sale
- ☐ Minimize Hassle
- ☐ Other (Specify in LONG_TEXT)

Specific Concerns or Potential Challenges

Write something...

Desired Timeline for Disposition (Target Date)

Enter date...

Level of Involvement Desired (Client/Owner)

- ☐ Full Involvement
- ☐ Partial Involvement
- ☐ Minimal Involvement (Delegate to Advisor)

Financial & Tax Considerations

Analyzing the financial implications of the disposition, focusing on potential tax liabilities and strategies for optimization.

Current Property Value (Estimate)

Enter a number...

Outstanding Mortgage Balance

Enter a number...

Estimated Selling Costs (Commissions, Fees, etc.)

Enter a number...

Holding Period (Years)

- ☐ Less than 1 Year
- ☐ 1-3 Years
- ☐ 3-5 Years
- ☐ 5+ Years

Capital Gains Tax Rate (Estimate)

- ☐ 0%
- ☐ 15%
- ☐ 20%

Notes on Potential 1031 Exchange Opportunities

Write something...

Estimated Capital Gains Tax Liability

Enter a number...

Date of Property Acquisition

Enter date...

Specific Tax Planning Strategies Considered

Write something...

Market Analysis & Valuation

Understanding current market conditions and establishing a realistic valuation range for the real estate asset.

Current Assessed Value

Comparable Sales - Average Price per Square Foot

Comparable Sales - Number of Properties Considered

Summary of Comparable Sales Analysis

Current Market Conditions (Overall)

- ☐ Seller's Market
- ☐ Balanced Market
- ☐ Buyer's Market

Submarket Trends (e.g., new construction, redevelopment)

- ☐ Positive
- ☐ Neutral
- ☐ Negative

Comparable Sales Comps (Spreadsheet/PDF)

 Upload File

Estimated Market Value

Enter a number...

Legal & Regulatory Review

Ensuring compliance with all applicable laws, regulations, and contractual obligations.

Existing Easements/Restrictions?

- ☐ Yes
- ☐ No
- ☐ Unknown

Summary of Current Leases (if applicable)

Write something...

Compliance with Zoning Regulations?

- ☐ Verified Compliant
- ☐ Potential Issues - Investigate
- ☐ Unknown

Date of Last Property Title Search

Enter date...

Copy of Title Insurance Policy

 Upload File

Summary of any pending legal actions or disputes related to the property

Write something...

Review HOA/Condo Documents?

- ☐ Yes
- ☐ No
- ☐ N/A

Identify any environmental permits required

Write something...

Due Diligence & Property Condition

Thoroughly examining the physical condition of the property and identifying potential liabilities.

Describe any known physical deficiencies or deferred maintenance.

Write something...

Property Condition Report (if available)

 Upload File

Estimated cost to remediate identified issues (USD)

Enter a number...

Summary of any environmental assessments conducted (Phase I, Phase II, etc.)

Write something...

Type of roof (e.g., Asphalt Shingle, Tile, Metal)

- ☐ Asphalt Shingle
- ☐ Tile
- ☐ Metal
- ☐ Other - Specify in Long Text

Date of last comprehensive inspection (if available)

Enter date...

Describe any known easements or encroachments.

Write something...

Status of any outstanding permits or code violations.

- ☐ No Issues
- ☐ Minor Issues – Resolved
- ☐ Minor Issues – Pending Resolution
- ☐ Major Issues – Requires Action

Marketing & Sales Strategy

Developing a plan to effectively market and sell the real estate asset.

Desired Asking Price

Enter a number...

Target Buyer Types

- ☐ Individual Homebuyer
- ☐ Investor
- ☐ Developer
- ☐ REIT

Listing Agency Selection

- ☐ Select Agency
- ☐ Agency A
- ☐ Agency B
- ☐ Agency C

Property Description (for marketing materials)

Write something...

Professional Photos (upload)

 Upload File

Marketing Channels

- ☐ MLS
- ☐ Online Advertising
- ☐ Social Media
- ☐ Broker Network
- ☐ Signage

Planned Listing Date

Enter date...

Unique Selling Points (USPs) to Highlight

Write something...

Projected Days on Market

Enter a number...

Negotiation & Contract Execution

Managing the negotiation process and ensuring the proper execution of contracts.

Initial Offer Strategy

- ☐ Aggressive (Target Quick Sale)
- ☐ Moderate (Balanced Approach)
- ☐ Conservative (Maximize Price)

Summary of Buyer's Initial Offer

Write something...

Buyer's Initial Offer Price

Enter a number...

Counteroffer Strategy Notes

Write something...

Contingency Review: Financing

- ☐ Accept
- ☐ Reject
- ☐ Modify (Specify)

Contingency Review: Inspection

- ☐ Accept
- ☐ Reject
- ☐ Modify (Specify)

Execution Date of Purchase Agreement

Enter date...

Notes on Negotiation Process & Key Decisions

Write something...

Copy of Executed Purchase Agreement

 Upload File

Closing & Post-Closing

Finalizing the transaction and addressing any post-closing matters.

Closing Date

Enter date...

Escrow Company Name

Write something...

Escrow Officer Name

Write something...

Closing Funds Dispersed (Net to Seller)

Enter a number...

Copy of Closing Statement

 Upload File

Notes on Closing Process/Unexpected Issues

Write something...

Title Company Satisfaction (1-5)

- ☐ 1 - Very Dissatisfied
- ☐ 2 - Dissatisfied
- ☐ 3 - Neutral
- ☐ 4 - Satisfied
- ☐ 5 - Very Satisfied

Date of Property Transfer (Deed Recording)

Enter date...

Post-Closing Follow-Up Actions Needed (e.g., Utilities Cancellation, Forwarding Address)

Write something...