WORKSHEET 01 / 08

# Before estate sale setup

Confirm these details with the sale team before setup begins. Ask before discarding or donating sale contents.

- [ ] Confirm working electricity and water, and discuss heating or cooling needs.
- [ ] Arrange keys, gates, alarm instructions, parking, and the best contact during sale hours.
- [ ] Share HOA or building rules, visitor restrictions, and permitted sale hours.
- [ ] Identify keepsakes and unresolved family decisions; agree on a collection date.
- [ ] Confirm move-out, listing, closing, and property handoff deadlines.
- [ ] Point out attic, garage, shed, and stored contents; discuss difficult access and any additional fees.
- [ ] Record agreed pricing restrictions and who can approve changes.
- [ ] Agree on the plan for unsold belongings and final property handoff.

## YOUR NOTES & NEXT STEPS

Detail / agreed arrangement / contact / date

WORKSHEET 02 / 08

# Family decisions & first steps

Agree on who decides, what stays, and what needs more time.

- [ ] Name the person coordinating decisions and confirm who can authorize the sale.
- [ ] List family keepsakes and belongings that need a decision.
- [ ] Record the person receiving each retained item and a collection date.
- [ ] Set disputed items aside until the family has agreed.
- [ ] Gather property deadlines, contacts, and access instructions.

## YOUR NOTES & NEXT STEPS

Item / decision / person responsible / date

WORKSHEET 03 / 08

# Room-by-room downsizing

Work through one room at a time, with the next home in mind.

- [ ] Measure the rooms and storage in your next home.
- [ ] List the furniture and everyday belongings you plan to take.
- [ ] Separate family gifts from belongings you may sell.
- [ ] Include closets, garage, attic, and outdoor storage in the review.
- [ ] Ask for a walkthrough before discarding or reorganizing the remaining household.

## YOUR NOTES & NEXT STEPS

Room / keep / family / discuss at walkthrough

WORKSHEET 04 / 08

# Moving & property handoff timeline

Start with your real deadline and work backward with the people involved.

- [ ] Record move, listing, closing, and property handoff dates.
- [ ] Ask the sale company which dates are practical before committing.
- [ ] Arrange collection of belongings the family is keeping.
- [ ] Confirm access, utilities, and any property restrictions.
- [ ] Agree on an unsold-item plan and who completes the final handoff.

## YOUR NOTES & NEXT STEPS

Milestone / date / person responsible / open questions

WORKSHEET 05 / 08

# Before the walkthrough

A clear picture of the household is more useful than a perfectly organized home.

- [ ] Identify belongings that are staying with the family.
- [ ] Note access restrictions and the deadline you are working toward.
- [ ] Gather questions about costs, preparation, insurance, and reporting.
- [ ] Ask before discarding, deep cleaning, or donating items.
- [ ] Bring the 17 Questions checklist to compare companies.

## YOUR NOTES & NEXT STEPS

Questions / belongings to keep / access notes

WORKSHEET 06 / 08

# Unsold items & final handoff

Make these choices before sale week so there is a clear next step.

- [ ] Confirm how unsold items will be identified and handled.
- [ ] Agree on what the family will collect and by when.
- [ ] Confirm donation acceptance, transport, or cleanout arrangements before relying on them.
- [ ] Check which work and charges are included in your agreement.
- [ ] Confirm report, settlement, keys, and the agreed property condition.

## YOUR NOTES & NEXT STEPS

Remaining task / approved plan / contact / deadline

WORKSHEET 07 / 08

# Shopping visit & pickup

Use the current sale listing and attending policies for the rules that apply to your visit.

- [ ] Check the sale address, dates, hours, and any sale-specific instructions.
- [ ] Read the current entry, payment, and pickup policies.
- [ ] Measure the space, doorway, and vehicle for larger purchases.
- [ ] Confirm the pickup deadline and the help or equipment you need.
- [ ] Keep your receipt and arrange transport before the pickup window closes.

## YOUR NOTES & NEXT STEPS

Item / measurements / pickup time / transport plan

WORKSHEET 08 / 08

# Professional client handoff

Help a client explain the situation without having to start from scratch.

- [ ] Confirm the client's permission to share their contact details.
- [ ] Identify the household location, decision-maker, and preferred contact method.
- [ ] Summarize the move or property deadline and any access constraints.
- [ ] Note retained belongings and unresolved family decisions.
- [ ] Agree on who needs updates and introduce the client to the sale team.

## YOUR NOTES & NEXT STEPS

Client contact / situation / timing / next conversation