

Your Offer Checklist

Everything worth gathering for your cash offer.

PROPERTY BASICS

- ☐ Property address and parcel or lot number, if you have it
- ☐ Approximate year built, square footage, and bed/bath count
- ☐ Mortgage balance and lender name, if the property is financed
- ☐ HOA name and contact info, if applicable

OWNERSHIP & TITLE

- ☐ Copy of the deed or your most recent property tax statement
- ☐ Mortgage payoff statement, if financed
- ☐ Names of everyone on title — co-owners, spouse, or heirs
- ☐ Any liens, judgments, or unpaid property taxes you're aware of

IF THE PROPERTY IS INHERITED OR IN PROBATE

- ☐ Letters testamentary or proof of executor / personal representative authority
A probate attorney can confirm your authority to sell if you're unsure.
- ☐ Contact info for the probate attorney handling the estate, if any
- ☐ Names of all heirs with an interest in the property

IF THERE ARE TENANTS, OR YOU'RE BEHIND ON PAYMENTS

- ☐ Copy of any active lease agreement(s)
- ☐ Most recent mortgage statement or notice of default
Contacting us does not stop or delay a foreclosure — talk to your servicer, a HUD-approved counselor, or an attorney as soon as possible.
- ☐ Any scheduled foreclosure sale date

BEFORE YOUR CALL, THINK THROUGH

- ☐ Your ideal closing timeline
- ☐ Whether relocation assistance would be helpful after closing
- ☐ Any repairs or condition issues you'd want to flag up front
- ☐ Questions you want answered before signing anything

This checklist is for your own preparation — not every item applies to every situation, and nothing here is legal advice. See our full FAQ at derivedwealth.com/faq.html or bring any open questions to your call.