Seller Equity & Net Proceeds Worksheet

Understand What You May Walk Away With

A home's value is only one part of the equation.

Before selling, it's important to understand your potential equity, estimated expenses, and how those factors may impact your proceeds.

This worksheet is designed to help you organize key information and begin planning for your next move.

Property Information

Property Address:

City:

Current Mortgage Balance (Approximate):

$ _____

Second Mortgage or Home Equity Loan (If Applicable):

$ _____

Monthly Mortgage Payment:

$ _____

Estimated Market Value

What do you believe your home may be worth today?

$ _____

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This worksheet is intended for educational and planning purposes only and should not be considered financial, legal, tax, or real estate advice. Actual proceeds, expenses, and market values may vary.

Have you recently received a market analysis?

☐ Yes

☐ No

Have you recently received an appraisal?

☐ Yes

☐ No

Estimated Selling Expenses

These are examples of expenses sellers may encounter. Actual costs vary.

Estimated Real Estate Fees:

$ _____

Estimated Attorney Fees:

$ _____

Estimated Transfer Taxes:

$ _____

Estimated Repairs or Buyer Credits:

$ _____

Estimated Moving Expenses:

$ _____

Other Estimated Costs:

$ _____

Total Estimated Selling Expenses:

$ _____

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Estimated Equity Calculation

Estimated Home Value

$ _____

Less Mortgage Balance

$ _____

Less Additional Loans

$ _____

Less Estimated Selling Expenses

$ _____

Estimated Net Proceeds

$ _____

This is an estimate only and not a guarantee of proceeds.

Planning for Your Next Move

If your home sells, what is your next goal?

☐ Purchase another home

☐ Rent temporarily

☐ Relocate

☐ Downsize

☐ Upsize

☐ Invest

☐ Undecided

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Desired Timeline:

☐ 0–3 Months

☐ 3–6 Months

☐ 6–12 Months

☐ More Than 12 Months

Seller Readiness Check

Check all that apply:

☐ I understand why I want to sell.

☐ I have considered my timeline.

☐ I have reviewed my mortgage balance.

☐ I have thought about my next housing plans.

☐ I understand there may be selling expenses.

☐ I want a better understanding of my home's value.

☐ I would benefit from a personalized selling strategy.

Questions & Notes

Use this space to record questions, concerns, or goals.

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Next Step

Knowing your estimated equity is only part of the planning process.

A personalized Seller Strategy Session can help you understand your market position, evaluate pricing considerations, discuss timing, and create a clear plan for moving forward.

📅 Book Your Seller Strategy Session

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