

Seller Philosophy Questionnaire

Complete digitally or print and return to Doug before your consultation.

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Selling a home isn't just a transaction — it's a strategy. And strategy starts with understanding you.

This questionnaire helps me understand your goals, your timeline, and what the right outcome looks like for you — not just your home. The more I know, the better I can represent you.

★ CRM fields keep your contact record current in my system. Fill out as many as you're comfortable sharing.

1 YOUR CONTACT INFORMATION — keeps your record current

First name ★ CRM

Last name ★ CRM

How do you want to appear on mail / marketing? ★ CRM

e.g. "Mr. and Mrs. Doug and Karen Roemer"

Phone ★ CRM

Email ★ CRM

Best way to reach you

☐ Text

☐ Phone call

☐ Email

☐ Text then call

2 SPOUSE / PARTNER & KEY DATES — so I never miss what matters

Spouse / partner name ★ CRM

Spouse / partner phone or email ★ CRM

Your birthday ★ CRM

Spouse birthday ★ CRM

Wedding anniversary ★ CRM

Children / pets ★ CRM

3 THE PROPERTY — what we're working with

Property address to be listed ★

How long have you owned it?

Year built (approx.)

Approx. sq ft

What do you love most about this home — what will buyers love?

4

YOUR HOME'S STORY — updates, improvements & known items

This section directly affects pricing, marketing, and what buyers will discover during inspection.
Be as specific as possible — year completed and scope are most useful. If you're not sure of the year, approximate.
Getting ahead of this now means no surprises later — for you or a buyer.

Updates & improvements in the last 10 years:

ITEM	YEAR	DETAILS / SCOPE
Roof		
HVAC — Furnace		
HVAC — Air Conditioner		
Water Heater		
Kitchen — Full Remodel		
Kitchen — Partial / Appliances		
Primary Bath		
Other Bathrooms		
Flooring		
Windows		
Electrical / Panel		
Plumbing		
Exterior / Siding / Paint		
Deck / Patio / Porch		
Basement Finish		
Addition / Structural Change		
Other Major Update		

Regular maintenance you stay on top of:

e.g. HVAC service, gutter cleaning, pest treatment, chimney sweep — signals a well-cared-for home to buyers

5 KNOWN ITEMS & DISCLOSURE PRE-SCREEN — getting ahead of what buyers will find**You'll complete a formal Seller's Disclosure as part of the listing process.**

These questions help us get ahead of it now — so nothing surprises us (or a buyer's inspector) later.

If you were staying in this home for 5 more years, what projects would you tackle?

This is one of the most useful questions I ask. Your honest answer tells us both what to address and what to disclose.

Anything a buyer's inspector is likely to find?

Roof age, older HVAC, any water history, foundation concerns, grading issues, etc. Better to know now.

Any history of water intrusion, leaks, or moisture issues?

☐ No — none that I'm aware of ☐ Yes — resolved ☐ Yes — ongoing ☐ Unsure

If yes — where, when, and what was done?

Any open permits, HOA violations, or legal encumbrances you're aware of?

☐ No ☐ Yes — explain below ☐ Not sure

Details:

Items that STAY with the home (included in sale):
Items that do NOT stay (excluded from sale):
6 YOUR WHY & MOTIVATION — the real reason you're selling**Why are you selling? Check all that apply.**

- | | |
|---|---|
| ☐ Upsizing — need more space | ☐ Downsizing — ready for less |
| ☐ Relocating — leaving Louisville | ☐ Relocating within Louisville |
| ☐ Already purchased / under contract | ☐ Estate / inherited property |
| ☐ Divorce / life transition | ☐ Investment — cashing out |
| ☐ Empty nest — home is too big | ☐ Testing the market |
| ☐ Financial reasons | ☐ Job change / commute |

In your own words — what does a successful sale look like to you?

Max price? Fastest close? Specific date? Minimum hassle? Be honest — it shapes the whole strategy.

Where are you going next?

Already bought? Moving to a rental? Out of state? Affects timing and strategy.

7 TIMELINE & PRICING STRATEGY — strategy starts here

When do you want / need to be sold by?

☐ ASAP ☐ Within 30 days ☐ 30–60 days ☐ 60–90 days ☐ Flexible

What matters most to you?

☐ Maximum price ☐ Fastest possible close ☐ Specific close date ☐ Minimum disruption

What do you think your home is worth?

Where does that number come from?

Have other agents given you a price opinion? What were you told?

Has this home been listed before?

☐ No — first time ☐ Yes — previously listed ☐ Yes — expired listing

If previously listed — prior price, dates, and what you think happened:

Minimum net proceeds needed from this sale:

e.g. payoff amount, down payment needed for next home

8 YOUR MINDSET & CONCERNS — so I can show up the right way

What are you most worried about with this sale?

Your emotional relationship with this home:

☐ Very attached — hard to let go ☐ Somewhat attached ☐ Ready and motivated ☐ Investment only — no attachment

Who else is involved in this decision?

Spouse, partner, family member, estate attorney, financial advisor?

Have you interviewed other agents? What stood out?

9 LOGISTICS & SHOWING — practical details that affect strategy

Is the home currently occupied?

☐ Yes — I live there ☐ Yes — tenants ☐ Vacant ☐ Partially vacant

Showing restrictions or preferences?

Pets? (buyers need to know for showings)

HOA? (name and annual fee)

Anything else I should know before we talk?

Thank you. Now let's talk strategy.

Once I review your answers I'll reach out to schedule our listing consultation.
I'll come prepared with real data, a clear pricing recommendation, and a plan.

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