

Home Offer Planning Worksheet

PLAN SMART. MAKE A STRONG OFFER.

A printable guide to help you organize the details, number crunch, and strategy behind your offer so you can move forward with confidence.

PROPERTY ADDRESS: _____

DATE: _____

PROPERTY DETAILS

Listing Price: \$ _____
MLS #: _____
Beds: _____ Baths: _____
Square Footage: _____
Lot Size: _____
Year Built: _____
Days on Market: _____

OFFER FINANCIALS

Offer Price: \$ _____
Earnest Money: \$ _____
Financing Type:
☐ Conventional ☐ FHA
☐ VA ☐ Other _____
Loan Amount (Est.): \$ _____
Down Payment (Est.): \$ _____

TERMS & TIMELINE

Proposed Closing Date: _____
Possession After Closing:
☐ At Closing ☐ Other _____
Rent-Back Requested:
☐ Yes ☐ No If Yes, Until: _____
Offer Expiration Date: _____
Inspection Period: _____

OFFER STRATEGY

What makes this home a great fit for you?

What is your top priority in this offer?

- ☐ Price
☐ Leaseback / Possession
☐ Fewer Contingencies
☐ Quick Close
☐ Other: _____

CONTINGENCIES

- ☐ Home Inspection
☐ Appraisal
☐ Financing
☐ Sale of Current Home
☐ Title / Clear to Close
☐ HOA / Condo Documents
☐ Other: _____

Notes / Specifics:

ADDITIONAL TERMS

Appliances / Items Included:

Appliances / Items Excluded:

Other Terms / Requests:

COMPARE YOUR OFFER

FACTOR	OUR OFFER	OTHER OFFER 1	OTHER OFFER 2	OTHER OFFER 3
Offer Price	\$	\$	\$	\$
Earnest Money	\$	\$	\$	\$
Financing / Cash				
Closing Date				
Possession Terms				
Inspection Period				
Other Terms				
Overall Strength (1-5)	☆☆☆☆☆	☆☆☆☆☆	☆☆☆☆☆	☆☆☆☆☆
My Notes				

DECISION CHECKLIST

- ☐ Fits my budget and goals
☐ Terms work for me
☐ Comfortable with contingencies
☐ Feels competitive in today's market
☐ I'm confident in moving forward
☐ Other: _____

MY NOTES

Helpful Tips

- 🕒 A strong offer is more than just price. Terms, timing, and flexibility matter.
<> Work with your agent to create a strategy that stands out.
📅 Be prepared, be confident, and stay focused on your goals.