

YOUR COMPLETE GUIDE TO

Buying & Selling

Simultaneously

THE HILLARY'S HOMES TEAM



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TEAM
AT COMPASS

Dreaming about a new home but need to *sell your current home?*

I understand that juggling both can feel overwhelming. That is why I created this guide just for you.

Inside, you will find straightforward and actionable tips to help you get your current home ready for sale while smartly planning your next purchase.

Whether you are ready to make a move now or just want to be prepared for the future, this guide offers valuable insights and expert advice to simplify your journey.

My goal is to help you hand over your old keys and step confidently into your new home without the stress.

If you have questions or want to talk about your buying and selling options, our team is here to support you every step of the way. Please feel free to reach out anytime.



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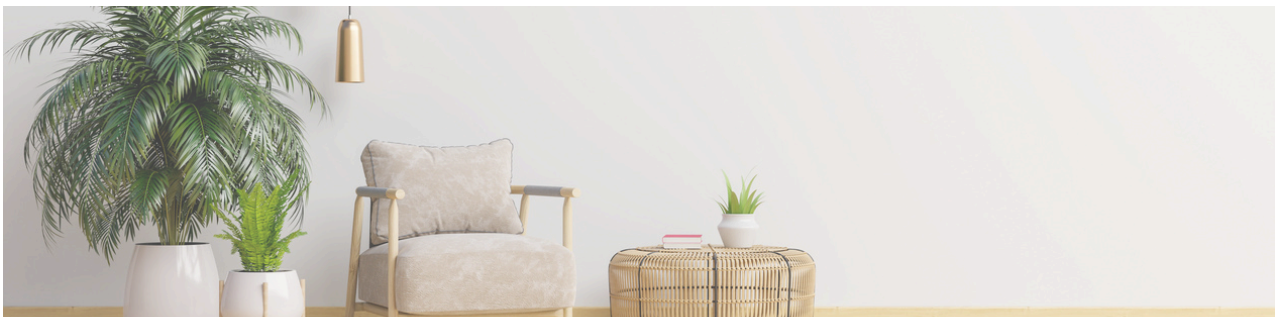


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“ Real estate is an imperishable asset, ever increasing in value. It is the most solid security that human ingenuity has devised. It is the basis of all security and about the only indestructible security “

- RUSSELL SAGE



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PART ONE

Buying & Selling Simultaneously

Embarking on the journey of buying a new home and selling your current one simultaneously is an exciting endeavor, but it can also be a complex process.

With the guidance of experienced professionals, you can move through the process with clarity and confidence.

In this guide, we will walk you through the essential steps to help you buy and sell at the same time. Let's get started.



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Buying & Selling Simultaneously



01. START WITH THE NUMBERS

Begin by evaluating your financial standing. Secure a mortgage pre-approval to get a clear picture of your purchasing capacity. Calculate the minimum proceeds required from selling your current home to ensure a smooth transition. Having a pre-approval letter or proof of funds will strengthen your position, making your offers more appealing to sellers.

03. PREPARE THE CURRENT HOME

Allocate resources to minor repairs and upkeep to improve your home's attractiveness. Proper staging can foster a warm, inviting environment for prospective buyers and potentially boost the sale price. Remember, initial impressions are crucial—make sure your home is spotless, organized, and visually appealing. Reach out to me to discuss our Concierge Program, which can front up to \$25k to help you get ready to sell.

05. TIMING MATTERS

Figuring out when you want or need to be in your new home is a great starting point, but for many, it's timing to get the most from your sale. This should be a very personalized analysis.

02. LEAN ON PROFESSIONALS

Alleviate stress and simplify the process by working with seasoned experts who specialize in handling multiple transactions at once. A knowledgeable agent can offer valuable guidance and help you navigate any potential obstacles.

04. PRICE IT RIGHT

Determine an attractive and achievable asking price for your current residence to draw in prospective buyers swiftly. We can assist you in evaluating market trends and identifying the optimal price point to ensure success and avoid disappointment.

06. NEGOTIATE

Sometimes timing or flexibility is more important than the price. We'll evaluate each offer specifically to ensure you choose the best buyer for your home and your transition plan.

Buying & Selling Simultaneously



07. CONTINGENCY CLAUSES

When making offers on new homes, contingency clauses can protect you. In our market, most sellers are not accepting sale contingencies because of high demand and competition. Because of this, we should consider other options. These can include bridge loans, longer closing periods, or temporary housing to help you move smoothly from your current home to your next one.

08. BRIDGE FINANCING

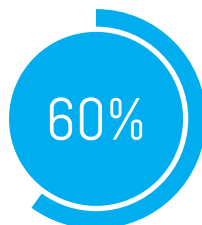
Timing the sale and purchase of a property can be difficult, so considering bridge financing might be beneficial. This approach involves securing a short-term loan to bridge the gap between purchasing a new home and selling the previous one.

09. BACKUP PLANS

Recognize that ideal timing is uncommon. There may be short intervals when you lack a permanent residence or require temporary accommodation. It's advisable to prepare alternative options, such as staying with relatives, renting a short-term rental, exploring leaseback arrangements, or utilizing bridge financing.

10. STAY ORGANIZED

Store all essential documents, agreements, and correspondence together in a centralized location. This approach simplifies access to information and helps you meet deadlines more effectively. Additionally, ensure clear and honest communication with everyone involved to avoid confusion and facilitate a smoother workflow.



"More than 60% of sellers are also buyers, making coordination between the two transactions a top priority in today's market." - NAR

PART TWO

The Home Selling Process

Let's get your home prepped, staged, listed, and
closed quickly - for top dollar.



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The Home Selling Process

01. Prepare Your Home for the Market

Meet with your agent

Consider repairs

Home prep checklist

02. Strategically Market Your Home

Determine the price

Professional photos & video

Execute marketing plan



03. Show Your Home

Staging your Home

Showing prep checklist

04. Sell Your Home

Go under contract

Pre-closing checklist



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Think About Property Repairs

- Homebuyers are generally attracted to move-in-ready properties that require minimal immediate work. Neglecting essential repairs and maintenance can discourage potential buyers and cause delays in closing the sale.
- To enhance your home's appeal, focus on key improvements such as decluttering, depersonalizing spaces, applying a fresh coat of paint, power washing exterior surfaces, and enhancing curb appeal.
- Along with professional staging that we can arrange, you can utilize the checklist provided on the following page to walk through each room of your home from a buyer's perspective. Consider how each space appears and feels, and make decisions about repairs and updates accordingly.
- Investing time and effort now can increase your home's value and facilitate a smoother sales process once a buyer expresses interest.



Home Preparations Checklist

Utilize this comprehensive checklist to walk through each area of your home, viewing it through the eyes of a potential buyer. Mark off any items that require attention, and once you've addressed them, check them off to keep track of your progress. For a thorough evaluation, consider engaging a professional home inspector to identify any repairs or issues that may need attention.



General

TO DO DONE

- | | | |
|--------------------------|--------------------------|--------------------------|
| ☐ | ☐ | Light Fixtures |
| ☐ | ☐ | Light bulbs |
| ☐ | ☐ | Worn/stained carpeting |
| ☐ | ☐ | Window glass |
| ☐ | ☐ | Cabinets |
| ☐ | ☐ | Sinks and faucets |
| ☐ | ☐ | Paint walls |
| ☐ | ☐ | Light Fixtures |
| ☐ | ☐ | HVAC |
| ☐ | ☐ | Flooring |
| ☐ | ☐ | Doors and trim |
| ☐ | ☐ | Wallpaper |
| ☐ | ☐ | Flooring |
| ☐ | ☐ | Carbon monoxide detector |
| ☐ | ☐ | Smoke detector |



Kitchen

TO DO DONE

- | | | |
|--------------------------|--------------------------|---|
| ☐ | ☐ | Clean counters and declutter |
| ☐ | ☐ | Clean tile grout |
| ☐ | ☐ | Clean appliances (Inside & out) |
| ☐ | ☐ | Window glass |
| ☐ | ☐ | Organize drawers, cabinets and pantries |
| ☐ | ☐ | Clean floors |
| ☐ | ☐ | Clean sink and disposal |



Bathrooms

TO DO DONE

- | | | |
|--------------------------|--------------------------|---|
| ☐ | ☐ | Dust and clean all surfaces |
| ☐ | ☐ | Declutter countertops and drawers |
| ☐ | ☐ | Fold towels |
| ☐ | ☐ | Window glass |
| ☐ | ☐ | Tidy cabinets and remove unnecessary toiletries |
| ☐ | ☐ | Clean or replace shower curtains |
| ☐ | ☐ | Clean moldy areas |



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Home Preparations Checklist

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Exterior

TO DO DONE

- | | | |
|--------------------------|--------------------------|--|
| ☐ | ☐ | Powerwash walkways & patios |
| ☐ | ☐ | Clean or repaint doors |
| ☐ | ☐ | Repaint trim |
| ☐ | ☐ | Wash windows |
| ☐ | ☐ | Trim hedges |
| ☐ | ☐ | Mow lawn |
| ☐ | ☐ | Weed & mulch |
| ☐ | ☐ | Arrange outdoor furniture |
| ☐ | ☐ | Repair fence |
| ☐ | ☐ | Replace any rotten wood |
| ☐ | ☐ | Pool/spa is clean and in working condition |



Living and Dining

TO DO DONE

- | | | |
|--------------------------|--------------------------|--|
| ☐ | ☐ | Remove clutter & personal items |
| ☐ | ☐ | Stage with pillows and throws |
| ☐ | ☐ | Dust and clean all surfaces and fixtures |
| ☐ | ☐ | Keep all tables clear and decluttered |



Bedrooms

TO DO DONE

- | | | |
|--------------------------|--------------------------|-------------------------------------|
| ☐ | ☐ | Remove clutter & personal items |
| ☐ | ☐ | Clean out and organize closets |
| ☐ | ☐ | Repair any damage in walls |
| ☐ | ☐ | Keep closets closed during showings |
| ☐ | ☐ | Make beds before any showings |



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Pricing Your Home



**ASSESSING THE MARKET CAREFULLY IS KEY TO UNDERSTANDING
YOUR HOME'S VALUE.**

DID YOU KNOW?

- ✓ Homes that are accurately priced right from the start often end up selling for more.
- ✓ When a property is listed too high, it can sit on the market longer—leading to fewer showings and reduced buyer interest over time. The best opportunity to attract attention is when your home is first listed, so setting the right price early is essential.
- ✓ Partnering with a knowledgeable agent who understands local market trends can help you establish a competitive price from day one.



Pros & Cons of Pricing

Pricing, whether too high or too low, can significantly impact a business. Setting prices too low can lead to lost revenue and profit, while setting prices too high can deter customers. Understanding the pros and cons of different pricing strategies is crucial for success.

1 AT MARKET VALUE

- Buyers and their agents will see it as a strong, fair value
- Less risk of appraisal complications
- More likely to show up in the right buyer search results

2 BELOW MARKET VALUE

- Attracts strong interest and can lead to a faster sale
- Appeals to motivated buyers looking for value
- Generates competitive offers, potentially driving up the final price

3 OVER MARKET VALUE

- May take longer to sell, leading to reduced interest over time
- Extended time on the market can create a negative impression with buyers
- Risk of appraisal issues with the lender—potentially bringing you back to the negotiation table



Marketing Your Home

Most potential buyers will discover your home online first. That's why I put a strong emphasis on reaching the widest possible audience through targeted online listings and digital marketing strategies.

Many agents may try to persuade you that they possess a unique strategy or "secret weapon" to market your home effectively.

In reality, all agents' listings are automatically distributed by the MLS to thousands of websites.

By combining a strong marketing strategy, an extensive local network and national of potential buyers, and years of industry experience, I'm confident we'll showcase your home to the right audience—buyers who are motivated and ready to act.



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Why are photos and videos so important in a listing?

The images of your home play a major role in whether a potential buyer decides to schedule a showing. That is why it is essential to have high-quality, visually appealing photos and videos that highlight your home's best features. To ensure this, we partner with some of the top real estate photographers and videographers in the area at no cost to you to present your property in the most compelling way possible.

Everything You Get in Your Personalized Marketing Strategy

- Featured on Brokerage Website
- Featured on Personal Agent Website
- Targeted Social Media Marketing Campaigns
- Interactive Virtual Tours
- Exclusive Sneak Peek Opportunities
- Open Houses for Buyers
- Neighbor Notification and Outreach
- Broker Previews for Real Estate Professionals
- Custom Digital and Printed Flyers
- Just Listed Email Campaign
- Professional Photography (including drone shots)
- High-Quality Professional Videography



Staging means carefully placing furniture, décor, and accessories to craft a welcoming and attractive environment. It's often very different from decorating.

Homes that are staged typically sell faster than those that are not. Additionally, a thoughtfully staged home creates a powerful first impression, attracting more interest from potential buyers.

Staging greatly enhances a home's visual appeal and helps a wider range of potential buyers imagine themselves living there.

Staging can potentially lead to a higher sale price, as it can emphasize the home's best features and create a sense of luxury and comfort.



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A man in a grey suit is showing a tablet to a couple. The couple consists of a man in a green jacket and a woman in a beige sweater. They are standing in a bright room with large windows. The text "Showing Your Home" is overlaid on the image in a large, white, serif font.

Showing Your Home

It's time to show your home! We'll work together to set the days and times that work best for your schedule to host showings.

I will provide you with an electronic lockbox to store a set of house keys. Any time this lockbox is opened, I am notified. That means no one is accessing your home without my knowledge.

Homes tend to show best when the homeowner isn't present. If that's not an option, we'll collaborate to create a positive experience for buyers while accommodating your lifestyle.

After each showing, I'll share any feedback provided by potential buyers to keep you informed and help guide our next steps.



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Showing Checklist

This checklist is designed to help you prepare your home before each showing, ensuring it looks its best for every potential buyer. From tidying up key areas to creating a welcoming atmosphere, these simple steps can make a big difference in how buyers experience your space and can even help your home sell faster.

- ☐ Enhance curb appeal by tidying the front porch, wiping down the entry door, and placing a doormat or decorative wreath to greet visitors warmly.
- ☐ Arrange furniture to create a sense of space and flow in each room.
- ☐ Make sure the home smells fresh by eliminating any unpleasant odors. Avoid strong air fresheners—instead, open windows ahead of time to let in natural fresh air.
- ☐ Switch on the lights and pull back the curtains to brighten the space with natural light.
- ☐ Close toilet lids and shower curtains, and display fresh, neatly arranged linens.
- ☐ Clear out personal belongings, paperwork, extra furniture, and clutter to create a clean, welcoming space that helps buyers feel at home.
- ☐ Make arrangements to have pets outside the home during showings and clean up any pet-related areas beforehand.
- ☐ Place fresh flowers or a bowl of fruit to create a warm and inviting atmosphere.
- ☐ Utilize staging techniques to highlight the most appealing aspects of your home.
- ☐ Adjust the thermostat to a comfortable temperature ahead of time to ensure a pleasant environment for visitors.



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The Selling Process



01. Going Live

Your listing is broadcast on the MLS and Compass.com as a Coming Soon to get the excitement building. Once we go live, it will be seen across our 100+ partner sites for the duration of the selling process.

02. Spreading the Word

I'll partner with the Compass marketing team to create stunning print materials and a smart paid social media campaign. We'll also place eye-catching signage outside your property.

03. Making Connections

I will continuously leverage my professional contacts and the Compass Network Tool to find ideal buyer brokers. Open houses will be hosted for both brokers and clients on an appropriate basis.

04. Feedback Analysis

I will conduct an ongoing assessment of the market response within the first 30 days of your listing going live. Feedback from agents and buyers is aggregated, and the listing strategy revised if needed.

05. Communication

We will establish the best method and frequency of communicating as the process unfolds, I will provide you with regular feedback and will keep you updated with continuous traffic metrics and information from the market.



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The Selling Process



06. Negotiations

When an offer comes in, I'll review the terms with you and break down the pros and cons. Together, we'll decide whether to accept, reject, or counter. If multiple offers are received, we'll develop a strategy to maximize your advantage.

08. Escrow

Once the contract is signed, the attorney receives the deposit and the buyer's contingency period begins. Your attorney and I will monitor all deadlines to ensure both sides stay on track and meet their responsibilities.

10. Closing

We'll oversee all the details to ensure a smooth closing. Once inspections are complete, contingencies are removed, and the buyer's loan is ready, we'll schedule the final walk-through. Escrow will then close, payment will be made, and the keys handed over. Congratulations!

07. Inspections

Inspecting the physical condition of your home is a vital part of the home-selling process. A licensed home inspector will conduct a comprehensive evaluation and report any problems with the condition of the home's structure or systems. I can recommend inspectors and coordinate scheduling the inspections for home, septic, oil, well, etc.

09. Final Walkthrough

Just before closing, the buyer usually conducts a final walkthrough to ensure the property is in the agreed-upon condition.



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PART THREE

The Home Buying Process

Ready to find your perfect home? I'll guide you from pre-approval through closing and beyond.



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The Home Buying Process

1 Find an Agent

Work with a dedicated real estate agent who understands the neighborhoods you're interested in and can expertly guide your search. Our team specializes in local markets and has a trusted network of agents across many areas, allowing us to connect you with an expert no matter where you're looking to buy.

3 Visit Properties

Before touring homes, we'll discuss your community preferences and research key factors. We can arrange area tours and set you up with a Compass Collection to receive updates on new and exclusive listings. Then, we'll start in-person showings to explore your neighborhoods of interest.

2 Get Pre-Qualified

Before starting your home search, it's important to get pre-approved for a mortgage loan—unless you plan to pay in full with cash. We can introduce you to a trusted mortgage broker who can assist you with this process at no cost or obligation and by reviewing your income and credit, you can determine your borrowing limit, giving you a clear idea of the price range to focus on during your search.



The Home Buying Process

4 Due Diligence: Home Inspections, Title Review & Repairs

It is the buyer's duty to schedule all desired home inspections and determine the overall condition of the property which is done prior to signing contracts. This due diligence may include the home, septic and oil inspections, as applicable. You may approve or negotiate credits/repairs. Your attorney will also review the disclosures and preliminary title report.



5 Sign Contract and Submit Deposit

The seller's attorney prepares the sales contract and provides it, along with the title insurance policy and any surveys, to your attorney. Any requested changes require the seller's approval before both parties sign. Typically, a 10% deposit is made at signing and held in escrow until closing, though this amount can vary.

6 Loan, Appraisal, & Insurance

The seller's attorney will draft a contract of sale and deliver it, along with the seller's title insurance policy and copy of any existing survey, to your attorney. If any changes are requested, the seller must agree to these changes. Contracts are then signed by both parties.

The Home Buying Process

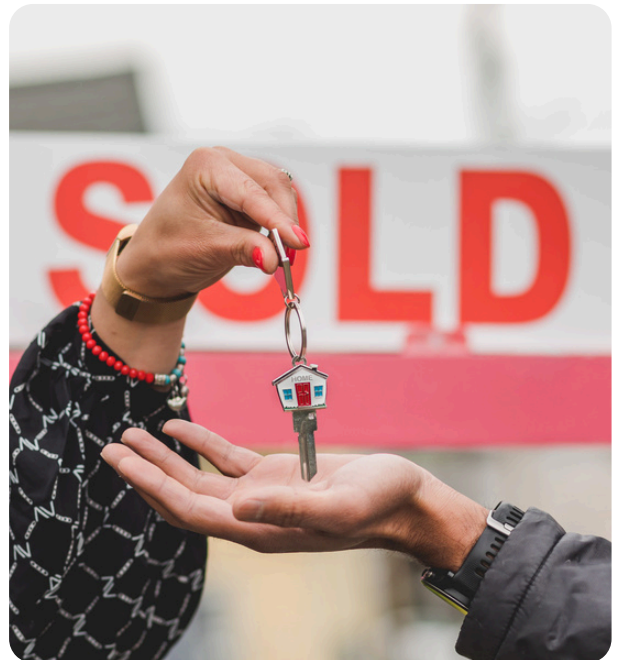


7 Prepare to Close

Once a closing date is scheduled, you'll notify all utility service providers about the transfer. Also, be sure to go to usps.com to fill out a change of address request. Prior to closing, we will schedule a final walk-thru to verify the property is still in acceptable condition and any negotiated repairs were done.

8 Closing

Once all the conditions of the contract have been satisfied, the closing is held. The closing documents are signed. payment is exchanged by either wire or bank checks and you will receive the keys to your new home!!



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A man and a woman are standing outdoors in front of a brick house. The man, wearing a green polo shirt, is holding a tablet and pointing at the screen. The woman, with curly hair and wearing a white shirt, is looking at the tablet with a smile. The background shows a residential street with other houses and a red car parked on the side.

The Home Search Process

With your wants and needs list ready, the exciting part begins—exploring listings and picking homes to tour in person. Pro tip: Keep your list handy to stay focused on what matters most!

Let's start with some best practices for searching online. You're likely familiar with sites like Realtor.com, Zillow, and Redfin, but how do you get the most relevant results? Try the tips below to refine your search and save time.

USING ONLINE REAL ESTATE TOOLS

Use search filters thoughtfully, but avoid narrowing your criteria too much. Keep your wants versus needs list in mind, consider expanding your search area, and increase your maximum price by \$25,000 to \$50,000 to allow room for negotiation.

If a home you love is marked as pending or under contract, do not worry. These deals sometimes fall through, so it is worth keeping the property in mind, especially if it meets your main criteria.

If a property catches your eye, take a look at it on Google Street View. Photos online can sometimes be misleading, and a virtual walk around the neighborhood can help you get a better feel for the home and its surroundings.

Make a note of the MLS numbers and property addresses that interest you. Send your list to me, and I will contact the listing agents to gather important details. Then, find time in your schedule to tour the homes. Be sure to allow more time than you think you will need.



Make the Most of Your Showings

You're more than ready to step inside those homes on your shortlist and discover if one could be your next address.

I know you're excited, but it's important to stay calm, focused, and clear-headed during showings. Here's a quick list to help you do just that!

KEEP THIS IN MIND AT SHOWINGS

Review your wants versus needs list and take another look at your budget.

Keeping these fresh in your mind will help you stay focused and make objective decisions.

Examine the roof for leaks, missing shingles, or other damage.

Inspect siding, windows, doors, and the overall exterior condition.

Think about the layout and available space.

Does the home's design fit your lifestyle? Pay attention to room sizes, storage options, and how the rooms connect.

Evaluate the potential resale value

by looking into the property's historical appreciation trends.



Make Your Offer Stand Out

So you think you've found "the one" and are ready to submit an offer that will be truly irresistible to sellers.

Let's discuss how to make an offer that really stands out. Below are my proven recommendations.

WRITING A COMPELLING OFFER

Include a pre-approval letter that shows that you're serious, qualified, and ready to purchase.

Use a friendly tone. Let the sellers know you want their home-and that you'll be easy to work with all the way to closing.

Put your best foot-and price forward. You may only get one shot, so make it count. Use comps and trends as a guide, but go in with a strong number you know a seller would find favorable.

Consider contingency items. Sometimes there are contingency items that can make or break an offer. Look closely at each one and consider what would make your offer stand out.



We're Under Contract!

Your offer has been accepted, time to celebrate! While there are still a few steps before moving day, you're well on your way to making your new house a home.

Here's a quick rundown of what happens after you make an offer and your new home is under contract.

YOUR OFFER WAS ACCEPTED! WHAT'S NEXT?

The seller's attorney will prepare the sales contract and send it to your attorney, along with the title insurance policy and any existing survey.

Once both parties agree, the contract is signed by everyone involved.

If you request any changes, the seller must approve them before moving forward.

Typically, a 10 percent deposit is made at signing, which is held in the seller's attorney's escrow account until closing. This amount can vary.



Inspections & Insurance

What is a home inspection?

A home inspection reveals any hidden issues with the property. You will receive a detailed written report. I recommend attending the inspection so you can ask questions and better understand the findings. If issues are found, the buyer may ask the seller to pay for repairs or lower the price.

The home looks fine. Do I still need an inspection?

Hidden problems like leaks or wiring issues can be costly. A professional inspection is essential before buying.

What about home insurance?

Once your contract is signed, begin shopping for insurance right away. Your lender will usually require proof of coverage before approving your mortgage. Be sure to compare several quotes.



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Pre-Closing Checklist

Bravo!

Here is what you have completed so far:

- ☒ In-Contract
- ☒ Inspections
- ☒ Obtain home insurance

**THE CLOSING TABLE IS NEAR!
HERE'S WHAT'S NEXT:**

“Real estate cannot be lost or stolen, nor can it be carried away. Purchased with common sense, paid for in full, and managed with reasonable care, it is about the safest investment in the world.”

- FRANKLIN D. ROOSEVELT

☐ **Order Appraisal**

An appraisal is a professional estimate of the property's value by a licensed appraiser. After inspection issues are addressed, the lender will order the appraisal, which you will pay for. This step confirms the property's value to the lender and helps protect you from overpaying.

☐ **Obtain Mortgage**

You have five days from signing the contract to start your mortgage application. In the 30 to 45 days before closing, your lender will finalize the loan.

☐ **Conduct Survey**

The title company checks the property's history to ensure clear ownership. They then provide title insurance to protect against future claims. This cost is part of your closing fees.

☐ **Clear to Close**

The “magic words” mean the mortgage underwriter has approved all required documents to fund the loan. Now, only the closing process remains.

PART FOUR

Moving Checklist

Use this checklist to make your move seamless and stress-free.



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4-6 WEEKS BEFORE MOVING

- | | |
|--|--|
| ☐ Declutter, discard & donate | ☐ Choose a mover and sign contract |
| ☐ Collect quotes from moving companies | ☐ Create a file of moving-related papers and receipts |
| ☐ Locate schools, healthcare providers in your new location | ☐ Contact homeowner's insurance agent about coverage for moving |
| ☐ Secure off-site storage if needed | ☐ Contact insurance companies to arrange for coverage in new home |

3-4 WEEKS BEFORE MOVING

Notify the following about your change of address:

- ☐ Banks + Post Office
- ☐ Credit Card Companies
- ☐ Insurance Companies

Notify utility companies of date to discontinue or transfer service

- | | |
|-----------------------------------|-----------------------------------|
| ☐ Electric | ☐ Gas |
| ☐ Water | ☐ Internet |
| ☐ Trash | ☐ TV |

2-3 WEEKS BEFORE MOVING

- | | |
|--|---|
| ☐ Notify DMV of new address | ☐ Close/open bank accounts |
| ☐ Discontinue additional home services (housekeeper, gardener/lawn service) | ☐ Arrange for child and pet care on moving day |
| ☐ Start using up things you can't move, such as perishables | ☐ Notify HOA about upcoming move, reserve elevator usage |

1 WEEK BEFORE MOVING

- | | |
|--|--|
| ☐ Confirm final arrangements | ☐ Take a picture in your home |
| ☐ Arrange transportation for your pets and plants | ☐ Pack an essentials box for quick access at new home |
| ☐ Review your moving-day plan with moving company | ☐ Label moving boxes with the contents inside |



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