

THE PLAYBOOK SOCIETY SELLER BRIEF TEMPLATE

Complete before signing the listing agreement. This document runs the mandate.

Property Address

Brief Date

MLS Number (if applicable)

Agent

LAYER 1 — THE FINANCIAL PICTURE

What does the seller need to net — not want, need. Establish this before agreeing on a list price.

Mortgage Payoff (estimated)

Estimated Closing Costs

Outstanding Liens or Judgments

Moving / Transition Budget

Minimum Net Required from this Transaction

\$ _____

Target List Price (seller's expectation)

\$ _____

Basis for seller's price expectation

Recent sale at 15 Central Park West / independent appraisal 2024 / Zillow AVM / prior agent's CMA

Has the seller reviewed a Comparative Market Analysis prior to this meeting?

☐ Yes ☐ No ☐ Unknown

Notes on financial constraints or flexibility

LAYER 2 — THE TIMELINE

The timeline is a strategic constraint — it affects pricing, negotiation posture, and showing protocol.

Target Close Date

Earliest Possible Listing Date

Hard Deadline (if any)

Occupancy at Closing

Owner-occupied / Tenant / Vacant

Is there a purchase contingency — a new home the seller is buying that depends on this sale?

☐ Yes ☐ No ☐ Unknown

If yes — details of the dependent purchase

3 Conyers Farm Drive, Greenwich CT — under contract / closing contingent on this sale / all-cash purchase

Is there a tenant currently occupying the property?

☐ Yes ☐ No ☐ Unknown

Lease Expiration Date

Tenant Cooperation for Showings

Cooperative / Restricted / Unknown

Job relocation, divorce, probate, or other deadline constraint

Notes on timeline flexibility

LAYER 3 — PROPERTY CONDITION AND DISCLOSURE

Systematic disclosure of what the seller already knows reduces liability and builds credibility with buyers.

Recent Improvements (past 5 years) — describe with approximate dates and costs

Primary suite renovation \$280K completed 2023 / Roof membrane replaced 2021 / HVAC dual-zone system 2022 / Smart home integration 2023

Known Deferred Maintenance or Issues

Year Built

HVAC Age / Last Serviced

Roof Age / Last Replaced

Water Heater Age

HOA?

☐ Yes ☐ No ☐ Unknown

Pending HOA Assessments?

☐ Yes ☐ No ☐ Unknown

HOA Monthly Fee

\$

HOA Docs Available?

Yes / No / In Progress

Pre-inspection completed or planned?

☐ Yes ☐ No ☐ Unknown

Inspector Name / Company (if applicable)

Any permit history issues or unpermitted work?

☐ Yes ☐ No ☐ Unknown

Details

Any active litigation involving the property?

☐ Yes ☐ No ☐ Unknown

Additional disclosure notes

LAYER 4 — THE SELLER'S MARKET UNDERSTANDING

Understanding what the seller believes tells you exactly how much the pricing conversation requires. Know this before you walk in.

What comparable sales has the seller reviewed?

834 Fifth Ave #14A — \$8.75M — closed Sept 2024 / 170 Beacon St — \$6.2M — closed Nov 2024 / seller believes subject property exceeds both

Has the seller spoken with other agents prior to this meeting?

☐ Yes ☐ No ☐ Unknown

Other agents consulted and prices suggested

Seller's assessment of the property's condition relative to market

Better than / same as / below comparable properties — and why

Key objections or concerns the seller has raised about pricing

LAYER 5 — PROCESS EXPERIENCE AND COMMUNICATION

Has the seller sold a home before?

☐ Yes ☐ No ☐ Unknown

Number of prior transactions and approximate years

Specific concerns about the showing process

24-hour notice required / no open houses / security team must be present / artwork requires specialist handling before showings

Preferred Communication Channel

Email / Phone / Text / WhatsApp

Best Time to Reach

Morning / Afternoon / Evening

Preferred update cadence

Weekly written update every Friday — agreed?

☐ Yes ☐ No ☐ Unknown

Any additional communication preferences

PRICE ADJUSTMENT PROTOCOL — AGREE BEFORE SIGNING

This conversation must happen before the listing goes live. A seller who has agreed to a protocol does not panic when the trigger is reached.

Agreed List Price

\$

Price Range the Seller is Prepared to Accept

Minimum Acceptable Net

\$ _____

Absolute Floor (walk-away price)

\$ _____

Price Adjustment Trigger — agreed criteria for recommending a reduction

Fewer than 3 qualified showings in 21 days / consistent feedback citing price vs. 15 CPW comp / DOM exceeds 45 days in this submarket

Trigger Timeframe (days on market)

Agreed First Adjustment Amount

\$ or %

Seller agrees in principle to adjust price if market data supports the recommendation?

☐ Yes ☐ No ☐ Unknown

Seller signature confirming price adjustment protocol discussion

Seller Signature

Date

AGENT NOTES — STRATEGIC OBSERVATIONS

Key observations from the technical visit

Risks identified before listing

Recommended next steps before going live

The brief is not a form. It is a professional act. — The Playbook Society | Method. Not Motivation.