



ARTHUR CERVANTES PROPERTIES, INC.

ACP SELLER INTAKE & CONSULTATION™

Seller Intelligence Questionnaire • Version 1.0

Designed to understand ownership, motivation, timing, condition, equity, pricing expectations, marketing preferences, transaction constraints, and the seller's next move.

How this consultation works

This is a structured discovery tool for Arthur or an ACP agent to complete with the client. It is designed to capture the facts needed for a strong consultation, surface missing information, identify next actions, and feed the ACP CRM/summary engine. It is not a loan application, appraisal, legal opinion, tax advice, or substitute for required forms.

Automation output

After completion, the ACP system should generate: (1) client profile, (2) readiness assessment, (3) key opportunities, (4) risk/missing-information flags, (5) recommended next steps, (6) documents needed, (7) follow-up tasks, and (8) a concise advisor briefing for Arthur.

A. Ownership, Authority & Decision-Makers

- 1 Property address and APN if known. What type of property is it?
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- 2 Full legal names of all record owners and the best contact information for every decision-maker.
.
- 3 How is title currently held: individual, joint tenancy, community property, trust, LLC/corporation, estate/probate, or other?
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- 4 Is anyone required to approve the sale besides the record owners (trustee, court, lender, business partner, spouse, attorney, conservator)?
.
- 5 Have you signed a listing or brokerage agreement with another agent? If yes, scope and expiration.
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B. Motivation & Timing

- 1 Why are you considering selling now?
.
- 2 What would a successful sale accomplish for you?
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- 3 Ideal listing date, ideal closing date, and absolute latest acceptable date.
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- 4 Is the sale tied to a purchase, relocation, retirement, probate, divorce, job change, exchange, financial need, or another deadline?
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- 5 What happens if the home does not sell by your preferred date?
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- 6 Would you consider renting/holding the property if pricing or market conditions do not meet your goals?
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C. Mortgage, Liens & Net-Proceeds Goals

- 1 Current first mortgage balance and approximate monthly payment.
.
- 2 Any HELOC, second mortgage, PACE/HERO assessment, solar loan/lease/PPA, tax lien, judgment, HOA lien, mechanic's lien, private loan, or other encumbrance?
.
- 3 Any delinquent property taxes, HOA dues, mortgage payments, or notices of default?
.
- 4 Approximate minimum net proceeds you hope or need to receive.
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- 5 Do you need proceeds from this sale to purchase another property?
.
- 6 Any known prepayment penalty, assumable financing, or special payoff issue?
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D. Occupancy & Access

- 1 Is the property owner-occupied, vacant, tenant-occupied, family-occupied, or used as a short-term rental?
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- 2 If tenant-occupied: lease term, rent, deposit, notices, tenant cooperation, and property-management information.
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- 3 Best showing windows and any restrictions on access.
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- 4 Pets, alarm, gate, lockbox, occupant health/accessibility concerns, or other showing logistics.
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- 5 How much advance notice is required for showings?
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E. Property Condition & Improvements

- 1 Year purchased, purchase price if known, and major improvements since acquisition.
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- 2 Roof age/condition; HVAC; plumbing; electrical; foundation; windows; water heater; appliances; septic/sewer; pool/spa; solar; well; manufactured-home systems where applicable.
.
- 3 Any known leaks, water intrusion, mold, drainage, fire, flood, earthquake, pest/termite, structural, or environmental issues?
.
- 4 Any insurance claims, major repairs, permits, additions, conversions, or unpermitted work?
.
- 5 Any inspection, appraisal, termite, engineering, roof, sewer, HOA, NHD, or other reports already available?
.
- 6 What repairs or improvements are you willing to complete before listing? What budget, if any, is available?
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F. Disclosures, Title & Legal/Association Matters

- 1 Any known boundary, easement, encroachment, access, title, neighbor, noise, nuisance, code, zoning, permit, or litigation issues?
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- 2 Any death on the property, insurance issue, prior water/fire damage, or other matter that may require disclosure under applicable law? Do not guess; flag for form/legal review.
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- 3 Is there an HOA or community association? Monthly/annual dues, special assessments, litigation, insurance issues, reserve concerns, rental restrictions, age restrictions, or approval requirements?
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- 4 Any land lease, manufactured-home park lease, space rent, park rules, or park approval requirements?
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- 5 Any solar lease/PPA, leased equipment, security system, water softener, propane tank, or other contract that may transfer or require payoff?
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G. Pricing & Market Expectations

- 1 What do you believe the property is worth, and what information is that based on?
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- 2 Have you received another CMA, appraisal, cash offer, investor offer, or iBuyer estimate?
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- 3 What is the lowest price you would realistically consider before selling no longer makes sense?
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- 4 Would you prioritize maximum price, fastest sale, certainty, minimal repairs, privacy, or flexible timing?
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- 5 How would you feel if market evidence supports a value materially different from your expectation?
.
- 6 Would you consider price adjustments if market response is weak? If yes, after what evidence or timeframe?
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H. Marketing & Presentation

- 1 Are you comfortable with professional photography, floor plan, Matterport/3D, aerial photography where lawful, video, social media, Homes.com/MLS syndication, and open houses?
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- 2 Any privacy/security restrictions on interior photography or public marketing?
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- 3 Would you permit pre-market preparation, broker previews, coming-soon marketing where allowed, or invitation-only outreach?
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- 4 Which features, upgrades, views, lifestyle benefits, history, or neighborhood conveniences do you believe buyers should understand?
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- 5 Do you have receipts, plans, warranties, manuals, permits, before/after photos, or improvement documentation that would help support the marketing story?
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I. Sale Strategy, Offers & Negotiation

- 1 Preferred escrow length and possession timing.
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- 2 Are you willing to consider financed buyers, cash buyers, VA/FHA buyers, contingent buyers, investors, or leasebacks?
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- 3 Are seller credits, repairs, home warranty, rate buydown, or closing-cost assistance negotiable?
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- 4 What factors besides price matter in selecting an offer: certainty, deposit, contingencies, closing date, rent-back, financing strength, buyer profile only to the extent lawfully relevant, or other objective terms?
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- 5 Who has authority to approve counters and changes, and how quickly can they respond?
.
- 6 Any terms you will not accept?
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J. Next Home / Relocation / Financial Planning

- 1 Where will you move after the sale? Do you already own or rent the next home?
.
- 2 Do you need ACP to coordinate a replacement-home purchase, manufactured-home option, relocation, rental, or out-of-area referral?
.
- 3 If this is an investment property, are you considering a 1031 exchange? If so, coordinate early with qualified tax/exchange professionals.
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- 4 Are there tax, estate, trust, divorce, bankruptcy, probate, or legal issues requiring CPA/attorney review before listing?
.
- 5 Do you want an estimated seller net sheet under multiple price/commission/credit scenarios?
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K. Service Expectations & Communication

- 1 What did you like or dislike about past real estate experiences?
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- 2 What would make you feel exceptionally well served during this sale?
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- 3 Preferred communication method and frequency.
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- 4 Who should receive showing feedback, offer summaries, weekly market reports, and transaction updates?
- 5 Would you like a weekly seller dashboard showing traffic, online engagement, showings, feedback, comparable activity, price changes, and recommended actions?

L. Documents & Immediate Next Steps

- 1 Documents to gather as applicable: mortgage/HELOC statements, property tax bill, HOA package, title/vesting, trust/entity documents, solar agreement, leases, permits, warranties, inspections, insurance claim history, improvement receipts, manufactured-home title/registration, park lease.
- 2 Authorize ACP to order/review MLS history, public records, preliminary title/property profile, comparable sales, and other permitted property intelligence.
- 3 Confirm next action: property walkthrough, CMA, seller net sheet, repair/preparation plan, listing presentation, title review, photography schedule, or listing-agreement appointment.
- 4 Sensitive documents should be provided only through an approved secure upload method.

ACP Internal Summary Fields

Client objective	_____
Readiness level	Ready now / Nearly ready / Planning stage / Needs specialist review
Top 3 opportunities	1. _____ 2. _____ 3. _____
Top 3 constraints/risks	1. _____ 2. _____ 3. _____
Documents missing	_____
Immediate next action	_____
Follow-up date	_____
Arthur review notes	_____

Fair Housing / privacy guardrail

Do not ask questions intended to identify or steer based on race, color, religion, sex (including sexual orientation or gender identity), disability, familial status, national origin, or other protected characteristics under applicable law. Location guidance should be based on the client's stated objective criteria and independently verifiable information. Sensitive financial and identity documents should be handled only through approved secure systems.