

Before Listing Your Home, Build a Document Request List

Create a property-specific request list, identify missing records and prepare a manageable packet for your sale advisers.



Read the current online edition:

realtylistingco.com/learn/seller-readiness/seller-documents-to-gather/

The Problem

Your agent asks for property records, but some are in email, some are with a former contractor and others may never have reached you. Searching for everything at once creates activity without showing what is actually needed. A useful first step is agreeing which records matter to this sale and who will review them.

Your goal: Create a request list that distinguishes available evidence, missing information and questions for the appropriate professional.

Ask what this sale needs

Start with your agent and closing professional rather than copying a long generic checklist. Describe the property type, ownership situation and improvements you know about. Ask which records they need, why they need them and which must come from someone else. Record a planning follow-up date, keeping it separate from an actual contractual or statutory deadline.

Index locations instead of copying everything

Use a simple row for the record name, date or version, source, secure location and intended reviewer. Possible groups include ownership records, loan information, association documents, improvement evidence and warranties. Keep passwords, identity-document copies, full account numbers and payment instructions out of the working list. Share sensitive originals only through an agreed channel.

Give gaps a specific next request

Write Unknown rather than reconstructing a permit number or installation date from memory. For each gap, identify a person or office to ask and the question they can answer. A missing receipt, a missing approval and an uncertain disclosure are different problems. Do not mark an issue resolved merely because someone forwarded an attachment.

Prepare a small reviewed handoff

Send the minimum records requested, identify the versions and ask the recipient to confirm receipt. Keep a short list of questions still under review. If a record contradicts an earlier answer, preserve both and ask how to correct the working packet. The goal is a traceable file that a professional can use, rather than a folder that only you understand.

A Practical Example

Fictional example: Joe Poe has a roof invoice but cannot locate the warranty. He labels the invoice as received and the warranty as requested. His agent receives the invoice with that distinction, while Joe asks the contractor whether a separate warranty document exists. No coverage or transferability is assumed.

Illustrative example, not a case history or a recommended legal outcome.

When to Get Help

Ask local counsel or the responsible transaction professional about disputed ownership, unclear authority, required disclosures or missing legal records. A household organizer cannot decide which documents satisfy those obligations.

Sources and Further Reading

Source guidance reviewed October 26, 2026. The organizing steps and example are RealtyListingCo's educational framework.

- National Association of REALTORS – Preparing to Sell Your Home

<https://www.nar.realtor/the-facts/consumer-guide-preparing-to-sell-your-home>

- Pennsylvania Code – Seller Property Disclosure Statement

<https://www.pacodeandbulletin.gov/secure/pacode/data/049/chapter35/s35.335a.html>

YOUR NEXT STEP CHECKLIST

Your Next-Step Checklist

- ☐ Ask for the property-specific record list
- ☐ Create a location and version index
- ☐ Mark missing facts Unknown
- ☐ Assign each request and follow-up date
- ☐ Confirm what the recipient received

One thing to do today: List five records your sale adviser has requested and where each currently stands.

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