

A working guide to selling your home

From the first planning conversation through recording and possession. Print these pages, write on them, and use the relevant sections as the sale develops.

HAWAI'I ISLAND

A successful sale depends on the property, the local buyer pool, the presentation, and the terms of the offer. This workbook gives us one place to collect facts, make decisions, and track what happens next.

Your sale at a glance

Property address / TMK

Owner(s) and preferred contact

Target listing window

Target closing or move date

Key reason for timing (optional)

Use only the pages that fit your property. Carol can prepare a property-specific plan and net estimate.

Carol Porter, REALTOR® | Hawaii Real Estate Salesperson RS-87584

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The selling journey

A flexible sequence; actual dates depend on your property, contract, financing, and escrow instructions.

01 Plan

Set goals, review the property, gather records, decide what to repair, and request a customized net estimate.

02 Prepare

Complete selected work, plan photography, settle pricing and launch timing, and approve marketing.

03 Launch

Publish accurate information, manage showings, review feedback, and revisit the plan as evidence arrives.

04 Evaluate offers

Compare price, buyer qualifications, contingencies, timing, requested items, and estimated net.

05 Escrow

Deliver documents, allow inspections and appraisal when applicable, resolve contract issues, sign, and confirm recording.

Working contacts

Carol / brokerage

Escrow / title contact

Tax professional

Contractor / property manager / HOA contact

Notes / questions for Carol

Before you spend money

A repair can protect a sale, but cosmetic spending is not automatically recovered. Review priorities with Carol before committing to major work.

Separate safety and function, maintenance, visual presentation, and buyer preferences. Obtain estimates where needed; confirm permits and contractor scope before scheduling.

Item / location	Concern or purpose	Est. cost	Decision / due

Decision key: Do / Consider / Skip / More information needed

Notes / questions for Carol

Property information to gather

A starting inventory for disclosure, marketing, and buyer questions. Write “unknown” where appropriate and flag anything needing verification.

Topic	Details / contact / approximate cost
HOA / AOA; dues; assessments	
Electricity and solar / PV terms	
Water source and service	
Wastewater system	
Internet / propane / other utilities	
Insurance and claims	
Roof, pests, major repairs	
Permits, plans, warranties	
Pool, irrigation, equipment	
STVR / tenancy, if applicable	

Notes / questions for Carol

The story of this property

Facts and lived experience can help explain what a buyer is seeing. Marketing claims should be checked before publication.

What do you love about living here?

What do visitors notice first?

Which improvements did you make, and when?

What should I know that may affect a buyer’s decision?

Seller document checklist

Gather what exists; the list is not a request to create records you do not have. Escrow and the contract determine what must be delivered.

Document / record	Have	Locate	Sent
Deed / title or trust / entity information			
Mortgage and lien account details			
Survey / staking / boundary records			
Permits, plans, final approvals			
Receipts and warranties for major work			
Solar / PV / battery contracts			
Insurance declarations and claims			
HOA / AOA documents and contacts			
Wastewater system records			
Termite / pest treatment records			
Leases, rental or STVR records			
Easements or unusual property rights			
Appliance manuals / service records			

Keep sensitive account numbers and identity documents in a secure channel specified by escrow. Do not write them in this workbook.

Preparation timeline

Choose dates with your actual listing plan. The checkboxes are prompts, not required tasks for every home.

Early planning

- ☐ Meet with Carol before major improvements; discuss pricing and timing.
- ☐ Locate documents; identify permits, solar terms, wastewater and HOA questions.
- ☐ Request contractor estimates and decide on a focused scope.

Several weeks before launch

- ☐ Complete agreed repairs and landscaping; arrange cleaning or staging.
- ☐ Confirm included and excluded items, access arrangements and showing plan.
- ☐ Review preliminary pricing, marketing facts and estimated seller net.

Final two weeks

- ☐ Wash windows and screens; clean outdoor surfaces and lanai.
- ☐ Trim landscaping for access and appropriate view sightlines.
- ☐ Schedule photography for favorable light and weather; prepare rooms.

Launch week

- ☐ Review listing details and photos for accuracy.
- ☐ Confirm showing instructions, pets, security and valuables.
- ☐ Agree on feedback cadence and next review date.

Notes / questions for Carol

Photography day

Present the property as it will be delivered. Discuss any virtual staging and required disclosure before use.

Exterior and outdoor living

- ☐ Remove cars, golf carts, hoses, bins and loose tools from view.
- ☐ Clean pool and equipment area; arrange lanai furniture and cushions.
- ☐ Trim landscaping; clean windows and screens; clear appropriate view lines.

Inside

- ☐ Clear counters, toiletries, magnets, cords and personal photographs.
- ☐ Make beds; check lamps, blinds and window operation.
- ☐ Close toilet lids; remove bath mats; turn ceiling fans off for stills.

Logistics

- ☐ Arrange for pets, children and occupants during the shoot.
- ☐ Check weather, trash pickup, best light and typical cloud patterns.
- ☐ Secure valuables and private papers; confirm photographer access.

Photo date / time

Items to finish before photographer arrives

Price, proceeds and launch decisions

Pricing follows current comparable sales, competing listings, property condition and buyer response. It can change as new evidence arrives.

Initial asking price

Comparable sales / competing listings to discuss

Launch date and first review date

Showing access and notice requirements

Estimated seller proceeds

Carol can prepare a transaction-specific net sheet. These blank amounts are discussion prompts, not a closing statement or tax calculation.

Expected sale price

Estimated mortgage payoff(s)

Estimated selling and closing expenses

Other liens, assessments or agreed credits

Estimated proceeds (subject to revision)

Notes / questions for Carol

When an offer arrives

Compare the whole transaction. A higher price may have different contingencies, costs, timing or execution risk.

Term	Offer A	Offer B	Offer C
Price			
Cash / financing and lender			
Down payment / deposit			
Inspection period			
Financing contingency			
Appraisal / gap terms			
Credits / repairs requested			
Personal property			
Closing / possession			
Other contingencies			
Estimated seller net			
Strengths / concerns			

Record exact contract terms separately. This worksheet is for discussion and does not replace the purchase contract or escrow instructions.

Preparing for inspection

Give the inspector access to systems and records. Document known conditions accurately rather than trying to make the house appear perfect.

- ☐ Clear electrical panel, water heater and accessible attic / crawlspace openings.
- ☐ Provide access to included appliances, plumbing fixtures, AC equipment and pool systems.
- ☐ Locate available service records for roof, pests, solar / PV and wastewater equipment.
- ☐ Keep utilities on as appropriate and confirm any operational instructions.
- ☐ Arrange pets and access; tell Carol about locked areas or safety concerns.

Inspection follow-up

Issue / request	Action / professional	Due / status

Notes / questions for Carol

Under-contract milestone tracker

Enter deadlines from the signed contract and any amendments. Carol and escrow will confirm the actual sequence and responsibilities.

Milestone	Target date	Done	Notes / questions
Offer accepted / escrow opened			
Initial deposit			
Seller disclosures and documents			
Buyer inspection period			
Repair or credit agreement, if any			
Additional deposit, if any			
Financing and lender updates			
Appraisal, if applicable			
Loan approval / contingencies			
Final walkthrough			
Signing and funds			
Recording confirmed			
Keys / possession			

A contract deadline may use calendar days or other defined terms. Read the signed agreement and amendments rather than relying on a generic timetable.

Hawai'i Island due diligence

These property-specific questions often affect disclosure, financing or buyer confidence. Bring uncertainty into the open early.

- ☐ Confirm permit history and describe improvements accurately; verify records where needed.
- ☐ Identify water source and wastewater system; gather available service documents.
- ☐ Gather solar / PV ownership, lease, power purchase agreement or battery records.
- ☐ Check HOA / AOA documents, assessments and insurance for applicable properties.
- ☐ Discuss survey / staking, access, easements and shoreline issues when relevant.
- ☐ Review cesspool status and any conversion requirements with qualified specialists.
- ☐ Ask lender / appraiser for needed property facts if the buyer is financing.

Property-specific questions to investigate

Tax and closing planning

Start early if residency, ownership structure, or withholding may affect proceeds. Escrow and a qualified tax adviser should determine the forms and amounts.

HARPTA concerns Hawai'i withholding on certain sales by nonresident sellers. FIRPTA concerns federal withholding when the seller is a foreign person. Exemptions, reductions, and filing procedures depend on the facts; withholding is distinct from the ultimate tax liability.

- ☐ Ask escrow and your tax adviser about HARPTA / FIRPTA applicability at the start.
- ☐ Confirm vesting, signing authority and identification requirements with escrow.
- ☐ Request payoff information and identify liens or assessments early.
- ☐ Review the settlement statement and wiring instructions through verified channels.
- ☐ Confirm recording and possession arrangements before releasing keys.

Closing questions

Useful official references

Rules, forms and timelines can change. These sources are a starting point for the professionals handling a specific transaction.

Hawai'i Department of Taxation: HARPTA forms

https://tax.hawaii.gov/forms/a1_b3_6harpta/

IRS: FIRPTA withholding

<https://www.irs.gov/individuals/international-taxpayers/firpta-withholding>

Hawai'i Department of Health: Cesspools

<https://health.hawaii.gov/wastewater/home/cesspools/>

Hawai'i law sets a 2050 deadline for replacing cesspools, with property-specific circumstances to review. Confirm current requirements and any earlier triggers or exceptions with the Department of Health and qualified professionals.

Your next conversation

Top three goals for the sale

The first decision we need to make

Next meeting / target date

With Aloha! Carol Porter, REALTOR®
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