

APPRAISAL-READY HOME CHECKLIST

Prepare your property. Organize your records. Make the appraisal visit easier.

Use this checklist to prepare your home for an appraisal under current appraisal guidelines, including UAD 3.6. Keep the information in one physical binder or digital folder so it is easy to provide to your Realtor, appraiser, lender, or other professionals involved in the transaction.

1. PROPERTY INFORMATION

- ☐ Current property address and legal description
- ☐ Property tax record
- ☐ Current parcel map or survey
- ☐ Zoning information, especially if the property has unusual or nonconforming characteristics
- ☐ HOA/POA information, if applicable
- ☐ Current HOA dues and what they cover
- ☐ Floor plans or architectural plans, if available
- ☐ Septic and well information, if applicable
- ☐ Flood insurance or elevation documentation, if applicable

2. DOCUMENT YOUR IMPROVEMENTS

Create a simple history of major improvements to the property.

- ☐ Roof — date replaced and contractor
- ☐ HVAC — installation date and service records
- ☐ Water heater
- ☐ Windows and exterior doors
- ☐ Kitchen renovation
- ☐ Bathroom renovation
- ☐ Flooring
- ☐ Deck, porch or patio
- ☐ Addition or structural modification
- ☐ Plumbing or electrical improvements
- ☐ Crawlspace improvements
- ☐ Solar installation
- ☐ ADU or additional living space
- ☐ Pool or other major exterior improvements
- ☐ Other significant improvements

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For each major project, keep:

- ☐ Approximate completion date
- ☐ Contractor information
- ☐ Invoices and receipts
- ☐ Building permits
- ☐ Final inspections or sign-offs, when applicable
- ☐ Warranties and service contracts
- ☐ Documentation of materials or equipment installed

3. DOCUMENT SPECIAL FEATURES

If your property has features that may require additional explanation, have the supporting documentation ready.

ADU / Additional Dwelling Unit

- ☐ Permit documentation
- ☐ Square footage
- ☐ Floor plan
- ☐ Utility information
- ☐ Rental information, if applicable

Solar

- ☐ Ownership documentation
- ☐ Lease agreement, if applicable
- ☐ Transfer requirements
- ☐ Installation information

Energy Improvements

- ☐ High-efficiency HVAC documentation
- ☐ Heat pump information
- ☐ Insulation upgrades
- ☐ Energy-efficiency certifications
- ☐ Energy Star equipment documentation

Pool / Waterfront / Outbuildings

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- ☐ Maintenance records
- ☐ Survey or site documentation
- ☐ Elevation certificate, if applicable
- ☐ Permits, if applicable

4. GET THE HOME READY FOR THE APPRAISER

Make the property easy to inspect.

- ☐ Provide clear access to all rooms and living areas
- ☐ Clear access to the attic and crawlspace
- ☐ Clear access to HVAC equipment
- ☐ Clear access to the water heater
- ☐ Clear access to the electrical panel
- ☐ Provide access to detached structures and ADUs
- ☐ Make sure utilities are operating
- ☐ Identify areas that are incomplete or under construction
- ☐ Address active leaks or obvious safety concerns
- ☐ Make sure smoke and carbon monoxide detectors are functioning

5. CHECK YOUR PROPERTY INFORMATION

Before the appraisal, review the information your Realtor and public records have about the property.

- ☐ Verify finished square footage
- ☐ Confirm above-grade vs. below-grade areas
- ☐ Verify bedroom and bathroom counts
- ☐ Verify number of levels
- ☐ Confirm property type
- ☐ Review listed amenities
- ☐ Check MLS information for outdated or incorrect information
- ☐ Compare important details with public records
- ☐ Make sure recent improvements are accurately described

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6. CREATE YOUR APPRAISAL PACKET

Keep everything together in one place.

- ☐ Property information
- ☐ Survey or floor plan
- ☐ Improvement history
- ☐ Permits and final inspections
- ☐ Contractor invoices and receipts
- ☐ Warranties
- ☐ Documentation for ADUs, solar and other special features
- ☐ Relevant maintenance records
- ☐ Other factual information your Realtor believes may help the appraiser understand the property

Remember:

You are providing information—not telling the appraiser what the home should be worth.

The appraiser remains independent. Your job is simply to make sure accurate, relevant documentation is available.

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