

Your sell-and-buy move worksheet

Compare selling first, buying first and coordinating closings. Map the cash, contingencies and possession dates before choosing a route.

Prepared by Jason Aussem | October 5, 2026 | Free planning resource

My constraints

☐ Target move date and backup date

☐ Need sale proceeds for purchase?

☐ Maximum overlap budget and temporary housing option

Compare sequences

☐ Sell first: temporary housing and storage cost

☐ Buy first: lender review and carrying costs

☐ Coordinate: contingencies and fallback if either side delays

Write the facts you know. Mark the questions you still need to confirm. Keep financial documents and account details out of this worksheet.

Your sell-and-buy move worksheet

Compare selling first, buying first and coordinating closings. Map the cash, contingencies and possession dates before choosing a route.

Prepared by Jason Aussem | October 5, 2026 | Free planning resource

Cash and contracts

☐ Estimated net sale proceeds and assumptions

☐ Next purchase's upfront/closing funds

☐ Sale and purchase deadlines with responsible people

Move logistics

☐ Possession terms for both homes

☐ Keys, insurance, utilities and movers

☐ Decision date for switching to the backup plan

Your next step

Choose one unanswered question and the person who can help. For a free personal real-estate plan, call Jason or use the optional request form on the guide page.

<https://agentaussem.com/guides/sell-and-buy-before-holidays>

Further reading from the Consumer Financial Protection Bureau:

Mortgage preparation: <https://www.consumerfinance.gov/owning-a-home/prepare/>

Compare loan offers: <https://www.consumerfinance.gov/owning-a-home/compare/>

Jason Aussem | 801-663-5555 | agentaussem.com

Agent Aussem Real Estate | Iconic: Realty Network, LLP

Planning guidance only. Financing, negotiated credits and closing dates are not guaranteed.