

# POST-SALE CHECKLIST

Steps to take after selling a home, from tax implications to moving logistics

**Agent:** Hi [Client's Name], congratulations again on the sale of your home! Now that we've closed, there are a few post-sale steps we should go through to ensure everything is in order.

**Client:** Hi [Your Name], thanks! I'm relieved it's done, but I'm not sure what comes next.

**Agent:** Let's start with the financial aspects. It's important to speak with your accountant about the tax implications of the sale. Depending on how long you've owned the home and the profit you made, there might be capital gains taxes to consider.

**Client:** I didn't think about taxes. I'll set up a meeting with my accountant this week.

**Agent:** That's a good plan. Next, let's talk about moving logistics. Have you arranged for a moving company?

**Client:** Not yet, I'm still looking for one.

**Agent:** I can recommend some reliable movers if you like. Also, make sure you cancel or transfer your utilities, including water, electricity, and internet, effective the day after you move out.

**Client:** A recommendation would be great, thanks. And I'll make a list of all the utilities I need to handle.

**Agent:** Perfect. It's also a good idea to forward your mail to your new address. You can do that easily online through the postal service.

**Client:** I'll add that to my list. Anything else I should be aware of?

**Agent:** Yes, you should keep all records of the sale and your moving expenses. Some moving expenses might be tax-deductible, especially if you're moving for a new job.

**Client:** Good to know. I'll keep all the receipts and documents organized.

**Agent:** Lastly, take a moment to update your address with banks, credit card companies, and your driver's license. It's important to keep all your records current.

**Client:** That sounds like everything. Thanks for helping me keep track of all these details, [Your Name].

**Agent:** You're welcome, [Client's Name]. If you have any questions or need further assistance, just let me know. Good luck with your move!