REAL ESTATE APPRAISAL / 01

CLARIFY THE ENGAGEMENT PURPOSE

Give every professional the same high-level reason and audience for the work.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Decision, transaction, planning need, dispute, reporting need, or other reason for considering an appraisal

Person or organization requesting the work and my role in the property or decision

Potential intended recipients or users to confirm with the appraiser

Lender, attorney, court, tax professional, insurer, estate representative, or other party involved

Important dates or events to discuss without assuming an effective date or deadline

My three priorities and questions for the first appraisal conversation

Preparation only. Not a valuation, appraisal review, inspection, lending, legal, tax, or transaction recommendation.

REAL ESTATE APPRAISAL / 02

ORGANIZE PROPERTY AND ACCESS FACTS

Record facts and available records without guessing at value or methodology.

Property address, type, occupancy, ownership or interest to discuss, and general use

Buildings, units, land, improvements, additions, renovations, damage, or unusual features to disclose

Access contacts, tenants, keys, gates, animals, operating hours, and areas that may be unavailable

Deeds, surveys, plans, permits, improvement records, prior reports, photographs, or other property documents

Leases, rent information, operating records, expense records, agreements, or other business documents that may exist

Known third-party requirements or questions that must be confirmed before ordering work

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REAL ESTATE APPRAISAL / 03

PREPARE ENGAGEMENT QUESTIONS

Tick what is ready; leave appraisal decisions for the professional to explain.

- [ ] The reason for considering an appraisal is stated
- [ ] Potential intended recipients are identified for confirmation
- [ ] The property and interest involved are described at a high level
- [ ] Access conditions and unavailable areas are listed
- [ ] Available records are inventoried without assuming relevance
- [ ] I have not estimated value or chosen a methodology
- [ ] Third-party requirements will be confirmed directly
- [ ] Every professional will receive the same engagement brief

Property visit, measurements, photographs, interviews, document, or data questions

Report, delivery, confidentiality, communication, revision, and correction questions

Client responsibilities, access timing, third-party coordination, and decision contacts

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REAL ESTATE APPRAISAL / 04

QUESTIONS FOR THE APPRAISER

Record how this professional would define, perform, communicate, and document the engagement.

Assignment: how are purpose, client, intended users, property interest, relevant date, and requirements confirmed?

Information: what access, property visit, measurements, photographs, records, interviews, and third-party data are needed?

Deliverable: what report is proposed, what will it contain, and what assumptions, exclusions, or limits apply?

Practice: who performs and reviews the work, and how are independence, confidentiality, conflicts, questions, and corrections handled?

Timing: what depends on access, documents, third parties, complexity, review, or other conditions?

Terms and fees: what is the complete fee structure, what may change it, and what client responsibilities and written terms apply?

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REAL ESTATE APPRAISAL / 05

COMPARE THE SAME APPRAISAL SCOPE

Use A and B in every box. Clarify differences before choosing.

Professional A / Professional B / consultation and proposal dates

Purpose, client, intended users, property interest, access, information, and visit needs - A / B

Report, delivery, assumptions, exclusions, confidentiality, communication, review, and timing - A / B

Client responsibilities, complete fee structure, written terms, changes, and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai and start a Real Estate Appraisal request. Share the property type and location, general purpose, involved parties, access, available records, desired timing, and open questions so participating pros can compete with proposals. Compare engagement scope, property visit and information needs, report and delivery, assumptions, communication, complete fee structure, written terms, and fit.

One request. Every pro's best offer.

Start a request

Participation varies. An engagement discussion and property access review may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/real-estate-appraisal

Consumer Financial Protection Bureau: What are appraisals and why do I need to look at them? (official reference)

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