Court-ready marketing record

FOR LENDERS & COUNSEL / Blank, fillable template

Complete only from verified records. Preserve original evidence and identify each attachment.
Use additional dated sheets where needed. Do not include privileged advice in a public filing.

01 / Property & file identification

Property address

Legal description / PID (verify against title)

Court registry / action number

Reporting period (from / to)

Lender / instructing party

Counsel / firm / contact

02 / Authority & scope

Order date, authority to market, and attachment reference

Written instructions, restrictions, and authorization dates

Not an affidavit or court form. Counsel must review before filing or relying on this record.

Pricing & property condition

Record the basis for pricing and each authorized change.

03 / Valuation & pricing

Appraisal / price opinion date, author, and attachment reference

Initial asking price and rationale (comparables / condition / market evidence)

Date	Asking price	Reason / evidence ref.	Approved by

04 / Condition, occupancy & access

Inspection dates, observed condition, occupancy, and photo references

Access restrictions / utilities / insurance checks / actions authorized

Not an affidavit or court form. Counsel must review before filing or relying on this record.

Marketing & exposure

Log completed actions and retain dated proof of publication.

05 / Listing identification

MLS® number / listing date

Listing brokerage / representative

Listing URLs and advertising links (include capture date)

06 / Marketing activity log

Date	Channel / action	Audience / result	Evidence reference

Evidence may include MLS® history, dated advertisements, photographs, floor plans, distribution records, showing records, and weekly reports. Record only measured results. Document any gaps, access limitations, and remedial steps on an additional dated sheet.

Not an affidavit or court form. Counsel must review before filing or relying on this record.

Showings, feedback & offers

Use anonymized buyer references where possible; retain originals securely.

07 / Showing & inquiry log

Date	Buyer / agent ref.	Feedback / limitations	Follow-up / evidence

08 / Offer summary

Received	Offer ref.	Price / deposit	Terms / conditions	Status / evidence

Offer presentation, lender instructions, and court-related steps (dates / refs.)

Keep signed offers and communications as separate attachments. This summary does not replace an offer, lender direction, court order, or legal advice.

Not an affidavit or court form. Counsel must review before filing or relying on this record.

Evidence index & review

Verify completeness with counsel before preparing any filing.

09 / Attachment index

Ref.	Document / description	Date / source	Location / custodian

10 / Pre-filing review

- [ ] Authority and scope checked against the actual order and instructions.
- [ ] Pricing history and marketing dates reconciled to original records.
- [ ] Showing, inquiry, and offer summaries supported by retained evidence.
- [ ] Personal information, redactions, and privilege reviewed with counsel.
- [ ] Attachments indexed; missing records and limitations disclosed.

Prepared by / role

Date prepared / version

Reviewed by / date / outstanding items

Not an affidavit or court form. Counsel must review before filing or relying on this record.