

Help the appraiser see the work

Appraiser Information Packet

A template for giving the appraiser clear, factual information about your improvements, income, and nearby sales.

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Before you start

Facts, not a target number

Appraisers value facts they can verify. A clean packet makes sure your improvements and income are not missed, especially after a renovation or when you are refinancing.

Keep it factual. Share information and documentation, and let the appraiser reach their own conclusion. Do not suggest or ask for a specific value; appraiser independence rules exist for good reason. On many loans, information may need to go through your lender rather than directly to the appraiser.

01 Cover letter

Dear _____,

Thank you for your time at _____. To make your visit easier, I have put together a short summary of recent improvements, current and projected income, and recent sales nearby, along with supporting documents. Please let me know if anything else would be helpful.

Sincerely,

_____ Phone _____ Email _____

02 Improvement summary

Work started

Work completed

Total invested \$

Permits pulled?

IMPROVEMENT	COST	DATE	WHAT WAS DONE
Kitchen			
Bathrooms			
Roof			
HVAC			
Windows			
Flooring			
Electrical / plumbing			
Exterior / landscaping			

03 Income details

UNIT	CURRENT RENT	LEASE ENDS	MARKET RENT (IF VACANT)
Unit 1			
Unit 2			
Unit 3			
Unit 4			

Attach copies of leases, a rent roll, or for short-term rentals, average daily rate and occupancy reports.

04 Comparable sales

Recent closed sales, ideally within about a mile and the last six months. I can pull these from the MLS for you.

ADDRESS	BEDS / BATHS	SQ FT	SALE PRICE	\$ / SQ FT	DATE	HOW IT COMPARES

05 Neighborhood notes

School district _____

Walkability _____

Nearby employers _____

New development nearby _____

06 Supporting documents

- ☐ Paid invoices and receipts
- ☐ Signed leases or rent roll
- ☐ Permits and final inspections
- ☐ Survey or floor plan
- ☐ Before and after photos
- ☐ Market rent analysis
- ☐ Insurance declarations and tax bill
- ☐ List of included appliances and fixtures



Let's talk about your next move

Refinancing or selling after a renovation?

I can pull recent comparable sales and leased rents from the MLS and help you put together a clean, factual packet for your lender and appraiser.

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