

HOW TO  
SUCCESSFULLY

*buy*

YOUR DREAM HOME

and

*sell*

YOUR HOME WITH THE  
LEAST HASSLE





welcome

Welcome!

If you've picked up this guide, chances are you're living in a home that no longer fits your life. Maybe you're a growing family ready to move up to more space, or you're ready to rightsize—trading that house that was perfect when the kids were little for one with better privacy, layout, or those conveniences you couldn't afford back then. Perhaps you need separate levels where teenagers can have their independence, or maybe you're ready for that rambler where everything's on one floor.

You've been through a real estate transaction before, so you know the basics. But buying and selling simultaneously? That's a whole different ballgame. I specialize in helping my clients navigate this exact transition.

I have a step-by-step strategy that keeps both transactions aligned, gets your current home sold and helps you land in exactly the right place—without the stress of juggling everything yourself.

In this guide, you'll find everything you need to coordinate both sides of this move with confidence. Think of me as that friend who just happens to be a total pro at the one thing that makes this complicated—the timing. Let's find you that home with all those conveniences that make daily life better. I'm excited to help you make this move with complete confidence!



Lisa Hansen  
REAL ESTATE



EPIQUE  
REALTY

# why you need an agent who specializes in simultaneous transactions

I know buying and selling at the same time can feel overwhelming.

You've bought before, so you know how much coordination a single transaction requires. Now double it—and add the pressure of perfect timing. There's a lot to orchestrate, and the stakes feel high because this is your family's home and future we're talking about.

But here's what I've learned after helping families through this: when you have the right strategy and someone managing all the moving pieces, it doesn't have to be so stressful.

My job is to take what feels complicated and create a clear, step-by-step process. I handle the coordination, keep everything on track, and help you make confident decisions along the way. You get to focus on the exciting part—finding that perfect place to land.



I'm not here to rush you into any deal just to close a transaction. I'm genuinely invested in helping you find that perfect place to land—the home that actually fits this season of your life.

Whether you're moving up or rightsizing, I take the time to understand what you really need and what will make your daily life better. This isn't about square footage or checking boxes. It's about finding the layout, the location, and the conveniences that work for your family right now.

let's chat

# BUYERS REP AGREEMENT



Let's Talk About the Buyer Rep Agreement  
Before we start looking at homes together, we'll sign a Buyer's Representation Agreement. It's required by law now for all agents, and honestly, it's a good thing: it makes our relationship official and puts everything in writing.

What this means for you: I'm legally your advocate, working in your best interest throughout both transactions. You get my complete focus, strategic negotiation on your behalf, access to my network, and all the experience I've gained helping clients through this exact transition.

We'll walk through it together, and I'm happy to answer any questions. This just ensures we're both protected and that you get the support you need.

successful

# BUYING PROCESS



I know buying and selling at the same time can feel overwhelming.

There's a lot to coordinate—timing, negotiations, inspections, contingencies—and the stakes feel high because this is your family's home and future we're talking about. But here's what I've learned after helping families through this for nearly a decade: when you have the right strategy and someone managing all the moving pieces, it doesn't have to be stressful.

My job is to take what feels complicated and create a clear, step-by-step process. I handle the coordination, keep everything on track, and help you make confident decisions along the way. You get to focus on the exciting part—finding that perfect place to land.



# Let's dive into the SELLING PROCESS

## Selling Successfully While Buying Your Next Home

You know what's involved in selling a home—marketing, showings, negotiations, inspections. But selling while you're actively house hunting and trying to time everything perfectly? That adds layers of complexity most sellers never deal with.

Here's what makes this different:

**Strategic Pricing** Your list price isn't just about getting top dollar—it's about timing. Price too high and your home sits while you miss opportunities on the buy side. Price it right and we create momentum that works in your favor on both transactions.

**Marketing That Attracts Serious Buyers** We don't have time for tire-kickers. Professional marketing, strategic staging recommendations, and targeted exposure bring in buyers who are ready to move—which means faster offers and smoother negotiations.



LISTING  
CONSULTATION +  
SET PRICE

PROFESSIONAL  
PHOTOS AND  
VIDEO

GET THE HOME  
READY FOR THE  
MARKET

COMING SOON  
PERIOD =  
ONLINE DEBUT

# Let's dive into the SELLING PROCESS

## Managing Showings While You're House Hunting

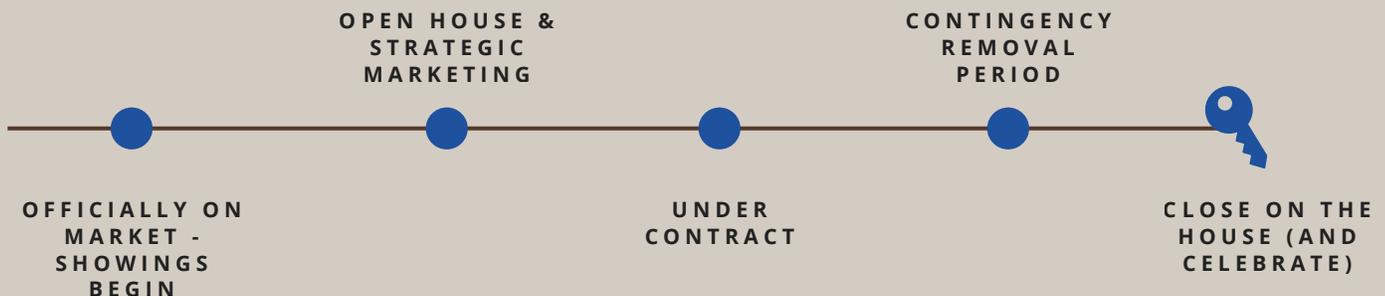
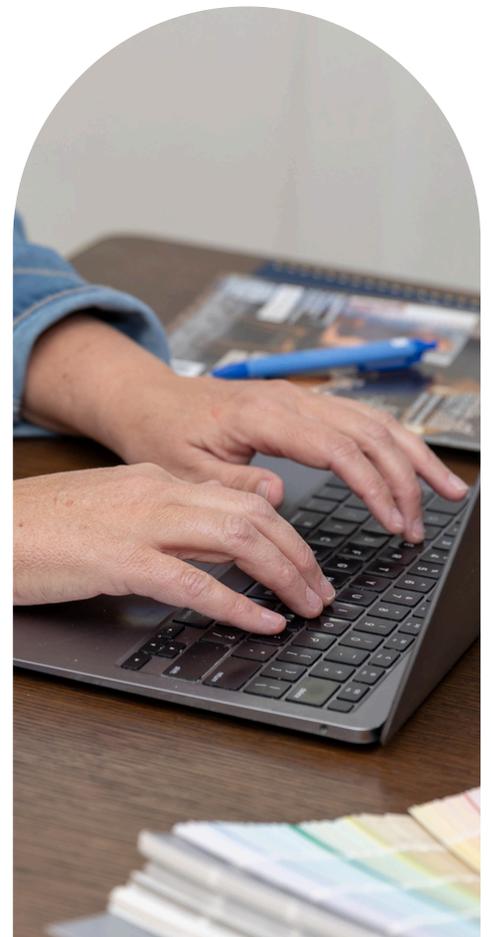
Living in a show-ready home while touring other properties is exhausting. I'll work with you to create a showing schedule that minimizes disruption and maximizes results.

**Negotiating with Your Next Move in Mind** Every offer and counteroffer on your current home affects your position as a buyer. I negotiate terms that protect you on both sides—closing dates, contingencies, and timing that align with your purchase strategy.

## Positioning You for Success on Both Transactions

The way we handle your sale directly impacts your ability to compete as a buyer. I make sure you're in the strongest possible position to get your next home while maximizing what you net from this one.

My job is to coordinate all of this so nothing falls through the cracks. You stay informed, make confident decisions, and focus on your family's next chapter.



# Your Step By Step Strategy For *buying* and *selling* Simultaneously

You've done this before, so I won't focus this guide on explaining what pre-approval is or how inspections work. What you need is a clear strategy for coordinating both transactions so nothing falls through the cracks. Here's how we'll work together:

**Step 1: Understand Your Current Home's Market Value** I'll provide a comprehensive market analysis so you know exactly what your home is worth in today's market—not what Zillow thinks, but what buyers will actually pay.

**Step 2: Calculate Your Real Budget** I'll create a detailed net sheet showing your proceeds after mortgage payoff, closing costs, and transaction expenses. This is your actual buying power for your next home.

**Step 3: Confirm Your Financing** With your net proceeds calculated, we'll make sure your pre-approval reflects your real budget. You'll know exactly what you can afford and what you'll need to finance.

**Step 4: Build Your Timing Strategy** This is the critical piece. Based on your situation, current market conditions, and what you're looking for, we'll create a customized game plan. List first or shop first? What contingencies protect you? What's your plan B? We'll map out every scenario.



**Step 5: Prep Your Home** Strategically I'll walk through your current home and tell you exactly what's worth doing to maximize your proceeds—and what's a waste of money. You'll invest smart, not just busy.

**Step 6: Launch Your Listing** We'll time your listing based on the strategy we built, with marketing designed to attract serious buyers fast.

**Step 7: Execute Your Home Search** Whether this happens before, during, or after listing depends entirely on your strategy. When the timing is right, we'll find homes that fit your needs and budget.

**Step 8: Coordinate Both Sides** This is where it all comes together. I manage negotiations, contingencies, timelines, and all the details on both transactions so everything aligns perfectly.

**Step 9: Close** Seamlessly Both deals close on schedule. You move directly from your current home into your next one—no double mortgages, no storage units, no scrambling



# Navigating Real Scenarios

## Examples Of How We Make It Work

Every situation is different, and there's no one-size-fits-all approach to coordinating simultaneous transactions. Here's how we've handled different timing challenges:

### Scenario 1: The Long Goodbye

The situation: After 20 years and raising a family in their home, these clients were ready for their dream lake home in Wisconsin. But two decades of memories meant a lot to sort through, and the house needed updating before it could go to market.

The strategy: We bought their lake home first. This gave them the breathing room to pack, make updates, and prepare their current home properly—without the pressure of a ticking clock. Once they were settled in Wisconsin, we listed their home staged and ready, and it sold quickly.

Why it worked: When you have significant prep work or emotional transition to manage, buying first (if financially feasible) removes the stress and lets you do both transactions right.

their finances, timeline, and what they were buying. That's what experience gets you—the ability to assess your situation and build the right strategy, not just apply a generic formula.



## **Scenario 2: The Strategic Contingency**

The situation: These clients had fixed up the cute Minneapolis bungalow I'd helped them buy a few years earlier and were ready to move up to a two-story in the suburbs. They'd built equity but needed to sell to buy.

The strategy: We made a contingent offer on their move-up home, then immediately got their bungalow market-ready and listed. It went under contract quickly, which allowed us to remove the contingency and coordinate both closings seamlessly.

Why it worked: In a market where you can sell quickly, a well-structured contingent offer lets you secure your next home while your current one hits the market. The key is being ready to list immediately and pricing to sell fast.

## **Scenario 3: The Build Timeline**

The situation: Ready for one-level retirement living and a lock-and-leave lifestyle, these clients decided to build a new construction villa—giving us a 6-month timeline to work with.

The strategy: Once they were under contract to build, we reverse-engineered the timeline. We prepped their home in stages and listed it strategically about 3 months before their new home would be ready—giving us time to get top dollar without risking a gap or double mortgage.

Why it worked: New construction timelines are predictable, which lets us list at exactly the right moment. List too early and you might close before your new home is ready. List too late and you're scrambling. Strategic timing is everything.

**The common thread?** Each family needed a different approach based on their finances, timeline, and what they were buying. That's what experience gets you—the ability to assess your situation and build the right strategy, not just apply a generic formula.

**You're experienced homeowners**, so you know real estate involves a lot of moving parts. Here's how I keep everything organized and keep you in the loop:

### **Regular Communication**

We'll check in weekly (or more often when things are moving fast). You'll always know where both transactions stand, what's happening next, and what decisions need to be made.

### **Clear Division of Responsibilities**

I'll tell you exactly what I'm handling and what you need to focus on. You won't be left guessing what's your job versus mine.



### **Proactive Problem-Solving**

If something comes up (inspections, appraisals, timing shifts), you'll hear about it from me first—along with our options for handling it. No surprises.

### **Strategic Guidance**

Not Pressure I'll give you my honest opinion and professional recommendation, but the decisions are always yours. My job is to give you the information you need to make confident choices.

### **Coordination You Can Count On**

From scheduling inspections to coordinating movers to making sure closing dates align, I manage the logistics so you don't have to live in a spreadsheet. You stay informed and in control. I handle the coordination and details.





# Next Steps

Ready to Make Your Move?

If you're ready to rightsize and want someone who specializes in coordinating both sides of this transition, let's talk.

Here's what happens next:

- We'll meet to discuss your specific situation and timeline
- I'll provide a market analysis and net sheet for your current home so you know your real buying power
- We'll build your customized strategy—whether that means listing first, buying first, or using a contingent offer
- You'll know exactly what to expect, when, and what comes next

You've done this before. You know what matters. Let me handle the part that makes this complicated—the timing and coordination—so you can focus on finding your perfect place to land.



Brokered by:

**EPIQUE**  
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