RED OAK APPRAISALS
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The house on the value date

Estate appraisal worksheet

Keep the original records. Use approximate dates when needed and mark them as estimates.

Value date requested by your advisor

Date the report is needed

1. What was the house like on the value date?

Record the room or feature, its condition, and how you know.

2. What changed afterward?

Include when the work actually took place and any uncertainty about the date.

3. What can help establish the timeline?

List dated photos, listings, invoices or a person who saw the home. Note any gaps.

Example

March photo shows the old roof. Contractor records show replacement in June.

Keep this sheet with your records. Arrange a private way to share documents with Jacob.

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