

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## Finance Details

Loan Amount Approved for: \_\_\_\_\_

Max loan you are willing to take out: \_\_\_\_\_

Max monthly payment: \_\_\_\_\_

How much cash do you want to use for the purchase: \_\_\_\_\_

Are you interested in purchasing a house that needs work? \_\_\_\_\_

What is the name of the loan officer (bank) you received pre-qualification?

\_\_\_\_\_

## Current Situation

How many people are in your family? \_\_\_\_\_

How many kids do you want to have? \_\_\_\_\_

How long do you plan on staying in the area? \_\_\_\_\_

How long are you planning on staying in your first home? \_\_\_\_\_

Are you currently renting? \_\_\_\_\_

When does your lease expire? \_\_\_\_\_

If we can find the property you are looking for are you ready to buy now? \_\_\_\_\_

Do you have any interest in owning rental property? \_\_\_\_\_

How do you like to communicate (phone, text, email)? \_\_\_\_\_

Are you currently working with another real estate agent? \_\_\_\_\_

Are you in an Exclusive Buyer Agency Contract with another agent? \_\_\_\_\_

## Your new home

	Amount or type (if applicable)	Rate importance (1 least to 5 most)				
		1	2	3	4	5
Bedrooms #		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Baths #		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kitchen (check all that apply)	Large / Modern / Country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Garage		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Basement		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total Square feet		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Size of yard	Acreage:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Level yard		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Particular house style	Ranch / Craftsman / Cape cod / Modern _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Floor plan	Open / Divided	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Area of town/Subdivision		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Elementary School		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Type of lot (circle one)	Country / Subdivision / City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Office/study		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patio/deck		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Formal dining room		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Family room		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Master Suite		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Are there any features not specified above that you would like to factor into your property search?

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