



BUYER QUESTIONNAIRE

Date: _____

BUYER CONTACT INFORMATION

LAST NAME _____ FIRST NAME _____ PHONE NUMBER _____ EMAIL _____

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CURRENT ADDRESS _____

ASSESS BUYER READINESS

1. Are you a first time buyer? _____

2. Why are you looking to move? _____

3. How long have you been looking for a home? _____

4. How are you going about your search? (open houses, internet, etc.) _____

5. When would you like to be in your new home? _____

6. Where are you currently at in the buying process? _____
 Need to sell a home? Need to close on a home? Non-Contingent?
 Have you talked to a lender – pre-approved?

7. When would you be available for a personal consultation? _____
When we meet, we can review homes currently on the market and I can give you my 10-point Purchasing Pathway system to prepare you for your home purchasing journey.

PURCHASING WISH LIST

Location _____ Price Range \$ _____

Style _____ Bedrooms _____ Baths _____

Home Features: Must haves (highest needs) _____

Additional wants (highest wants) _____

Client Profile

Contact Data

Name _____	Name 2 _____
Address _____	City/State _____
Phone _____	Child _____ Birthdate _____
Email Address _____	Child _____ Birthdate _____
Email Address _____	Child _____ Birthdate _____
Employer _____	Employer _____
Position _____	Position _____
Address _____	Address _____
Bus. Phone _____	Bus. Phone _____

Property Preferences

Location _____ Style _____ Price Range \$ _____ Size _____

Rooms _____ Bedrooms _____ Baths _____ Garage _____ Schools _____

Transport _____ Shopping _____ Other Preferences _____

Source of Funds

Cash \$ _____

Proceeds from sale of home \$ _____

Personal borrowing \$ _____

Sale of securities, etc. \$ _____

Mortgage on new home \$ _____

Current Housing

We rent and the lease expires _____

We have not yet offered our home for sale

We are putting our home on the market _____

Our home is on the market now for \$ _____
It is listed with _____

Other _____

The home is sold and should close on _____

Financing

Most sellers now require a pre-approval letter from a mortgage company or bank at the time of the offer.

- We have already talked to a mortgage broker
- We need the names of mortgage brokers
- We will be purchasing without a mortgage

Timing

- If the home is right we will buy now
- We plan to buy within _____ months
- We have not made a decision on when
- We would like to time the sale of our current home with the purchase of a new home
- We do not need the proceeds from our current home to purchase a new home

Other comments