

CONTACT INFORMATION

Name: _____

Mailing Address: _____

Email 1: _____ Email 2: _____

PHONE NUMBERS

Seller 1 Mobile: _____ Office: _____ Home: _____

Seller 2 Mobile: _____ Office: _____ Home: _____

Children: _____

BEST TIME TO REACH THEM

Time(s): _____

Special Instructions: _____

ASK

HAVE YOU SEEN ANY PROPERTIES THAT INTEREST YOU?

Property Address #1: _____
Why?: _____

Property Address #2: _____
Why?: _____

ASK

May I ask what made you contact me and my company?

SOURCE:

ASK

Are you currently viewing/receiving listings of homes with any other Realtors?

If so, who?

Have you signed a buyer agency agreement with the other Realtor®?

If so, who?

YES

NO

INTEREST

ASK

I want you to make sure we cover everything you would like during this call.
Can you share with me the top 3-5 things you want to know about the buying process?

1.	
2.	
3.	

4.	
5.	
6.	

EXPERIENCE/EXPECTATIONS

Have you ever bought a home before?	
When was that?	
Can you tell me a little bit about your experience?	

TIME FRAME

What is the ideal time frame for you (and your family) to make a move?			
Do you have a home you would like/need to sell before you purchase?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
If so, is the home currently on the market?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
If yes to above, how long has it been listed for sale?		With whom is it listed?	
Are you currently in a lease?			
If you rent, when does your lease expire?			
Additional Notes :			

FINANCIAL

Do you know what your buying power is?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Do you already have an existing relationship with a loan officer?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Have you received a qualification letter from the loan officer?	<input type="checkbox"/> YES	<input type="checkbox"/> NO

ASK

IF YOU CAN HAVE A LENDER CALL THEM

STOP! ASK FOR AN APPOINTMENT!

FINDING YOUR HOME

ASK What are the Top 3 things you expect your Realtor to do to find a home for you?

1. 2. 3.

Let's talk about your wish list:

MUSTS:

LOCATIONS	
Area/City 1	
Area/City 2	
Schools?	

BASIC					
Bedrooms		Bath		Square Feet	
Garage		Lot Size		Maximum Ages	
New Construction?					

WANTS

- | | | | |
|----|--|----|--|
| 1. | | 5. | |
| 2. | | 6. | |
| 3. | | 7. | |
| 4. | | 8. | |


AVOID/NOT WANTED

- | | | | |
|----|--|----|--|
| 1. | | 3. | |
| 2. | | 4. | |

SPECIAL NEEDS/CONCERNS

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GETTING TO KNOW THE BUYER

Do you have any concerns about buying a home?		<input type="checkbox"/> YES	<input type="checkbox"/> NO
Note concerns about buying a home:			
Do you have any concerns about the market?		<input type="checkbox"/> YES	<input type="checkbox"/> NO
Do you have any concerns about interest rates?		<input type="checkbox"/> YES	<input type="checkbox"/> NO
 Is there anyone else that will be helping you make the decisions during the home buying process?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
NAMES:			

OBJECTIVES

If we could create a perfect situation for you, what does it look like?	
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HOW THE REALTOR/TEAM WORKS

	I think I have enough information to get started. I have availability on:						
DAY 1:		TIME 1:		DAY 2:		TIME 2:	
Which works best for you?							
Would you be willing to sign a buyer/Realtor commitment letter? ("If I Will, Will You?")							

NEXT STEPS

1. I will be sending you a buyer guide to help walk you through the process and give you some mortgage lenders to contact.
2. Let's meet at the office before we look at homes so we can lay out a plan and discuss the buying process.
3. Before we meet, make sure you have called one of the lenders to get pre-qualified. This is very important and I will be happy to help you make this call. When we find your perfect home, you will be able to make a strong offer with a pre-qualification letter already obtained.