

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

BUYER APPOINTMENT FORM & QUESTIONNAIRE

**Client's Info:**

Name: \_\_\_\_\_ Mobile: \_\_\_\_\_

Partner's Name: \_\_\_\_\_ Mobile: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_ Other Contact: \_\_\_\_\_

E-Mail: \_\_\_\_\_ Partner's E-Mail: \_\_\_\_\_

Preferred Method & Point of Contact: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Source: \_\_\_\_\_

**Financial & Timing:**

Are you a 1<sup>st</sup> time buyer? \_\_\_\_\_

Are you: \*Renting \*Lease ends \_\_\_\_\_ \*Relocating \*Live with Relative

If Own: Do you have a house to sell? \*Yes \*No Do you need to sell to buy? \*Yes No

What is your comfort zone with a monthly payment? \_\_\_\_\_ Absolute Max: \_\_\_\_\_

What is your comfort zone with a price range? \_\_\_\_\_

What is most important to you? \*To have a lower purchase price \*To have a low monthly payment

Are you planning on putting down a down payment? 0% 3.5% 5% 10% 20% \$ \_\_\_\_\_

How much TOTAL cash are you comfortable using towards the purchase? \_\_\_\_\_

When would you have access to these funds? \_\_\_\_\_

Have you met with a lender yet? \*Yes (Who?) \_\_\_\_\_ \*No

**Motivation/Time Frame:**

When would you ideally like to be in your new home? \_\_\_\_\_

If we found the absolute perfect home for you in the next thirty days would that pose a problem for you? Y N

Is there anyone else involved in your buying decision? \*Yes \*No

**Lifestyle:**

Who will be living in the home you purchase? \_\_\_\_\_

Do you have any pets? N Y \*What kind? \_\_\_\_\_ What are their names? \_\_\_\_\_

Any Special Furniture or Equipment? \_\_\_\_\_

**Location:**

Tell me about your ideal location: \_\_\_\_\_

What is your maximum commute time/distance? \_\_\_\_\_

What is your work address? \_\_\_\_\_

Partner's Work Address: \_\_\_\_\_

Are schools important? \_\_\_\_\_

**House Criteria:**

What Type of home are you looking for:

- \*Single family            \*Townhome            \*Twin/Row home            \*Condo/Flat

How much overall space are you looking in a home? (minimum)

Bedrooms: \_\_\_\_\_ Full baths: \_\_\_\_\_ Total baths \_\_\_\_\_ Overall SqFootage \_\_\_\_\_

Do you have a preference for when the house was built? \_\_\_\_\_

Do you want a home in move-in condition or are you willing to do some work?

\_\_\_Major (kitchen and bathroom renovations, tear down walls, additions and alterations)

\_\_\_Minor (carpet, paint)

Do you have any preferences when it comes to HOA? Condo Association? \_\_\_\_\_

What style of homes do you prefer or dislike:

- \*Cape    \*Bi-level/split-level    \*Victorian    \*Ranch    \*Colonial    \*Traditional
- \*Stone    \*Brick    \*Wood    \*Vinyl    \*Hardy Plank    \*Stucco

Floor Plan:

- \*Closed floor plan            \*Open floor plan

What are your preferences for the master bedroom? (master suite, first floor master, second floor/same level as others, walk-in closet, dual closets) \_\_\_\_\_

What are your preferences for the bathroom(s)? (stall shower, bathtub, soaking tub, jetted tub, dual sink vanity)

\_\_\_\_\_

What are your likes and dislikes for the kitchen? (color cabinets, island, open to family room, gas cooking)

\_\_\_\_\_

Is a formal dining room important to you? \_\_\_\_\_

Do you want a fireplace? What type? \_\_\_not a must    \_\_\_would be nice    \_\_\_absolutely

What other rooms do you need or want? (office, basement) \_\_\_\_\_

What are you looking for in terms of a garage? \_\_\_\_\_

What size and style of a lot do you prefer: Size: \*Less than \_\_\_\_\_ acre(s)    \*More than \_\_\_\_\_ acre(s)

Style: \*Low maintenance    \*Level lot    \*Private/Secluded    \*Wooded/cleared    \*Pond/Water view

Do you have a preference when it comes to public water/sewer vs. on site well/septic? \_\_\_\_\_

What are your thoughts on a pool? \_\_\_\_\_Would love one! \_\_\_\_\_Doesn't matter either way \_\_\_\_\_Absolutely not

What is your favorite room in a house/What do you like to do at home:

\*Kitchen/cooking/entertaining    \*Family room/relaxing    \*Master    \*Back Deck/Screened in Porch  
\*Finished Basement/Man cave    \*Outdoors/hunting/fishing/gardening/pets/farm animals

Why: \_\_\_\_\_

### Summary:

What are the top five things your home **needs** to have?

What are your absolute **must-haves (or must not-haves)**? These are things that I will ONLY send you homes if they do or do not have these things. (Air conditioning, garage, in a neighborhood, not on a busy street, HOA/no HOA, outdoor living space-deck/patio, off street parking, etc.)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

What about things you would PREFER to have, but not an absolute deal breaker?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Now that we have discussed what you are looking for, is there anything else that comes to mind that you think will be important for your home purchase to be a great experience? \_\_\_\_\_

\*\*What days/times work best for your schedule for showings? \_\_\_\_\_

Do you have any additional questions or concerns that I have left unanswered?

### Experience:

Have you purchased a home before?    \*Yes    \*No

If so, tell me about you past home buying experience: \_\_\_\_\_

How long did the process take last time you purchase? \_\_\_\_\_

Was there anything that your previous realtor did or did not do that you would like me to make sure I do or not do? \_\_\_\_\_

### Notes & Action Items for Showing Specialist on BACK OF PAPER (if any)