

YOUR GUIDE TO BUYING A HOME

GETTING STARTED: YOUR BASIC INFORMATION

1 Name _____
Phone _____
Email _____
Birthday _____
Occupation _____
Mailing Address _____

2 Name _____
Phone _____
Email _____
Birthday _____
Occupation _____
Mailing Address _____

Referred By _____

Who is the primary contact & what is your preferred method of communication?

Whose name will be on the mortgage?

What is prompting your move?

In a perfect world, when do you need to be in your new home?

Are you pre-approved for a mortgage?

What is your price range?



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GETTING STARTED: YOUR LIFESTYLE INTERVIEW

Lifestyle

Who will be living in the home you purchase?

Describe your lifestyle. What do you enjoy doing at home? Do you do a lot of entertaining? How do you spend your time in the evenings and on the weekends?

Do you have any pets?

Do you have anything special that needs to be accommodated such as athletic equipment, fine art, large furniture, or a work vehicle?

Location

Tell me about your ideal location.

Are schools important?

What else is important about your location?



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GETTING STARTED: YOUR HOME WISH LIST

General

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

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

Do you want to have a swimming pool or spa? If HOA, pool and/or spa?

Structure/Exterior

What type of home are you looking for (e.g., single-family, condo, town house, etc.)?

Approximately what size house are you looking for (square footage)? _____

How many stories? _____

What size lot would you like? _____

What are you looking for in terms of a garage (e.g., attached, carport, etc.)?

What other exterior features are important to you?



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GETTING STARTED: YOUR HOME WISH LIST (CONT.)

House – Interior

What kind of floor plan do you prefer (e.g., open vs. walls between all living spaces)?

Bedrooms

How many bedrooms do you need? _____

How will each of those rooms be used? _____

What are your preferences for the primary bedroom? _____

Bathrooms

How many bathrooms do you need? _____

What are your needs for each of the bathrooms? _____

Kitchen

What features must your kitchen have (e.g., breakfast area, types of appliances, etc.)?

What finishes do you want (e.g., countertops, flooring, appliances, etc.)? _____

What are your likes and dislikes for the kitchen?

Dining Room

Would you like the dining room to be part of the kitchen configuration? What about the living room? _____

What size dining room table do you have? _____



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GETTING STARTED: YOUR HOME WISH LIST (CONT.)

Living Room/Family Room

Describe your likes and dislikes. _____

What type of flooring do you prefer? _____

Do you want a fireplace? _____

What else should I know about the inside of the house you are looking for?

Summary

Deal Breakers? _____

High Priority? _____

What are your expectations for me as your real estate agent?

What would make it be a 10/10 experience?

1

2

3

4

5

What is your work schedule & availability for showings?



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