



Home Buyer Worksheet

Last Name (s): _____ Home Phone: (____) _____

First Name: _____ Work Phone: (____) _____ E-mail _____ @ _____

First Name: _____ Work Phone: (____) _____ E-mail _____ @ _____

Home Address: _____

City _____ State _____ Zip _____ + _____

To help you achieve your goals in relation to buying a home I need to ask you some questions that will help me to understand how I can serve you best. Tell me, what is the primary reason you are interested in finding a new home?

How many children do you have? _____ Names : #1 _____ Birthdate _____

#2 _____ Birthdate _____ #3 _____ Birthdate _____

#4 _____ Birthdate _____ #5 _____ Birthdate _____

Do you have any special school requirements? _____

Do you have any pets? Yes No Type of pet's? _____ Pets Names _____

Approximately how many square feet are you looking for in a home? _____

Number of Bedrooms? _____ Number of bathrooms? _____ Yard Size? _____

What is the price range you would like to stay within ? _____

What is that minimum price you must pay to avoid capital gains taxes on your last home? _____

What is the absolute highest you would consider spending if you found the perfect house? _____

Please rate the importance of each feature that you would like in a home.

1 being not important. 5 being very important.

Fireplace.....	1 2 3 4 5	Closet space.....	1 2 3 4 5
Entertainment area.....	1 2 3 4 5	Den.....	1 2 3 4 5
Family room.....	1 2 3 4 5	Modern kitchen.....	1 2 3 4 5
Carpet color.....	1 2 3 4 5	Pool/Spa.....	1 2 3 4 5
Open feeling.....	1 2 3 4 5	Large yard.....	1 2 3 4 5
Family neighborhood.....	1 2 3 4 5	Low maint. yard.....	1 2 3 4 5
Single story.....	1 2 3 4 5	Privacy.....	1 2 3 4 5
Double story.....	1 2 3 4 5	BBQ area.....	1 2 3 4 5
Dining room.....	1 2 3 4 5	View.....	1 2 3 4 5
Close to schools.....	1 2 3 4 5	Close to shopping.....	1 2 3 4 5
Close to work.....	1 2 3 4 5	Location.....	1 2 3 4 5

Is there a special feature I have not mentioned that is important to you? _____

What I would like you to do now is describe what you would consider an ideal home for you. Tell me about the floor plan, decor, yard, etc. ? _____

Tell me about your lifestyle. What do you see yourself doing in your new home? (Entertaining, relaxing, raising a family, etc.) _____

Are there any areas you have in mind that you would like to look at? _____

What attracted you to this area(s)? _____

What do you feel will be the key factors in your purchasing decision? (Price, terms, locations, etc.)

What time frame do you have in mind for moving? _____
What will you do if you do not find a home in that time frame? _____

Do you need to sell another home before moving? Yes No
Is that home currently listed for sale? Yes No If yes, how much is it listed for? _____
Agent that you listed with? _____ Phone _____
How long has it been on the market? _____

My goal is to help make buying your home a positive experience. To do that we need open communication between us. That way the little problems that naturally come up in buying a home can be handled easily and without stress. Is there anything that you would like to tell me that you feel might be helpful in our working together?

Do you have a person who you would prefer me to use as the main contact? Yes No Either
If yes to above who is the preferred contact? _____
When is the best time(s) for me to call you? Sun: Yes No Time _____
Mon: Yes No Time _____ Tues: Yes No Time _____ Wed: Yes No Time _____
Thurs: Yes No Time _____ Fri: Yes No Time _____ Sat: Yes No Time _____
When is the best time for you to look at property? _____

Do you understand how the real estate MLS service works? Yes No Do you understand how an agent who finds you a home gets paid? Yes No After I have shown you a number of homes that are close, but not quite the one you are looking for, and you walk into an Open House being held by another agent and say this is the home, what would you do? Check one: a. Ask the agent at the open house to write up the offer. or b. Call and ask me to write up an offer on the home. Are you willing to commit to working only with me to help you find a home? Yes No

Comments: _____

Financial Information

In order to help you obtain the best interest rates & terms, I need to gather some basic financial information. This will allow me to explore all options and to expedite your loan once we have located the right home for you. Providing this information is at your discretion. It will be held in total confidence and will only be used to help secure the most favorable financing terms possible on your behalf.

Employment information:

Your Occupation: _____ Gross Monthly Income _____

Who is your current employer? _____ Years _____

Business Address _____

Spouse's Occupation: _____ Gross Monthly Income _____

Spouse's current employer? _____ Years _____

Business Address _____

Do you have other sources of income? Yes No Explain _____

How many years have you been married? _____ Anniversary Date _____

How much money do you have available for a down payment? _____

Where is the money coming from? _____

Do you understand how financing a home works? Yes No Closing costs? Yes No

Loan Origination fees? Yes No Title Insurance? Yes No

Would you like me to send you some information about any of these items. Yes No

Please list what you would like information on.

What forms of financing are you considering in purchasing a home? Fixed Rate Yes No

Variable Rate Yes No F.H.A. Yes No V.A. Yes No

Do you have financing available through work, family or other means? Yes No Please explain.

Would you like me to recommend a mortgage representative that could prequalify you and go over with you exactly what is needed to get the best rates and terms to prequalify for a loan? Yes No

When would be a good time for a loan representative to call you? _____

What bills do you have over \$150.00 per month?

Car _____ Insurance _____

Car _____ Boat _____

Credit Card _____ Investments _____

Credit Card _____ Child Support _____

Credit Card _____ Alimony _____

Credit Card _____ Other _____

Other _____ Other _____

Do you have any other major financial obligations that could have a bearing on the purchase of a home? _____