



CONTACT INFORMATION

NAME(S) _____ PHONE (CELL) _____ WORK _____

STREET _____ CITY, STATE, ZIP _____

EMAIL _____

COULD YOU TELL ME A LITTLE ABOUT YOURSELF?

DO YOU HAVE A FAMILY?

I'M INTERESTED IN HEARING ABOUT THE WORK YOU DO

WHAT DO YOU DO IN YOUR TIME OFF?

IF YOU WON THE LOTTERY TOMORROW, WHAT WOULD YOU DO?

IF YOU COULD LIVE ANYWHERE, WHERE WOULD THAT BE?

MOTIVATION — ABILITY — NEEDS

DO YOU CURRENTLY OWN A HOME? HOW LONG HAVE YOU LIVED THERE? HOW MANY HOMES HAVE YOU OWNED? HOW LONG HAVE YOU BEEN LOOKING?
 OWN RENT _____ YEARS _____ MONTHS

HOW MANY HOMES HAVE YOU SEEN? ARE YOU CURRENTLY WORKING WITH AN AGENT? HAVE YOU SIGNED A BUYER BROKERAGE AGREEMENT?
 _____ YES NO YES NO

HAVE YOU SEEN ANY HOMES YOU'VE LIKED? DID YOU MAKE AN OFFER? IF YES, WHAT HAPPENED? IF NO, WHY NOT?
 YES NO YES NO _____

IF YES
IF NO

WHAT ARE YOU LOOKING FOR THAT YOU HAVEN'T FOUND?

ARE YOU FAMILAR WITH BUYING REAL ESTATE IN GEORGIA?

WILL YOU BE APPLYING FOR A MORTGAGE OR PAYING CASH? DO YOU HAVE A LENDER? MORTGAGE LENDER NAME: PHONE: HAVE YOU BEEN PRE-APPROVED?
 CASH MORTGAGE YES NO _____ _____ YES NO

URGENCY

HOW SOON WOULD YOU LIKE TO BE MOVED AND SETTLED? WHY?
 ____ / ____ / ____

HOW WOULD YOUR PLANS BE AFFECTED IF YOU MOVED EARLIER OR LATER?

WHAT WOULD HAPPEN IF YOU DIDN'T FIND A HOME BY THEN?

IF WE FOUND THE "RIGHT" HOME TODAY, WHAT WOULD YOU DO? IS THERE ANYTHING YOU NEED TO RESOLVE BEFORE YOU PURCHASE YOUR HOME?
 _____ _____

WILL ANYONE ELSE BE INVOLVED WITH THE DECISION TO PURCHASE? WILL ANYONE BE OFFERING FINANCIAL ASSISTANCE AS A GIFT?
 _____ _____

(IF ALREADY OWN A HOME) ARE YOU ABLE TO BUY ANOTHER HOME WITHOUT SELLING YOUR CURRENT HOME? IF NO, IS YOUR CURRENT HOME ON THE MARKET DO YOU HAVE PLANS ON WHEN THAT WILL BE?
 YES YES _____
 NO NO

NEEDS AND PRIORITIES

OF ALL THE THINGS YOU WANT TO ACCOMPLISH WITH THIS MOVE, WHAT'S MOST IMPORTANT?

IN YOUR CURRENT HOME, WHAT ARE THE "THINGS" ABOUT IT THAT YOU LIKE BEST? WHY?

THE "THINGS" ABOUT IT THAT YOU LIKE THE LEAST? WHY?

HOW LARGE OF A HOME DID YOU HAVE IN MIND? WHY?

WHAT IS YOUR FAVORITE ROOM IN A HOME? WHY?

HELP ME VISUALIZE HOW YOU'D LIKE YOUR NEXT HOME TO LOOK?

WHAT ARE THE MOST IMPORTANT FEATURES TO YOU? — (THE WHAT'S)

IT'S BENEFITS — (THE WHY'S)

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WHAT ARE THE THREE "THINGS" YOU CAN'T LIVE WITHOUT?

WHY?

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FINANCIAL QUALIFICATIONS

WHAT PRICE RANGE DID YOU HAVE IN MIND?

HOW DID YOU DECIDE ON THAT AMOUNT?

HOW MUCH OVER THAT AMOUNT WOULD YOU BE WILLING TO GO IF A HOME WAS APPEALING?

DO YOU HAVE A MONTHLY PAYMENT YOU WOULD BE COMFORTABLE WITH?

WHAT IS THE MAXIMUM PAYMENT YOU WOULD CONSIDER?

LENDERS REQUIRE FOUR ITEMS OF FINANCIAL INFORMATION (CASH, INCOME, DEBT AND CREDIT). DO YOU MIND IF I ASK A FEW QUESTIONS ABOUT THESE?

HOW MUCH DO YOU WANT TO PUT AS A DOWN PAYMENT?

DO YOU HAVE ANY CONCERNS ABOUT THE INTEREST RATE YOU WILL BE QUALIFIED FOR BASED ON YOUR CREDIT SCORE?

[] YES [] NO

IS THERE ANYTHING THAT WILL SHOW UP ON A CREDIT REPORT THAT WE SHOULD RESOLVE BEFORE LOAN APPLICATION?

THE PROCESS

THE LAST TIME YOU BOUGHT A HOME, COULD YOU DESCRIBE THE PROCESS TO FIND THAT HOME?

WHAT WERE THE STEPS YOU WENT THROUGH?

DID ANYONE HELP YOU MAKE THE DECISIONS?

ONCE YOU STARTED, HOW LONG DID THE PROCESS TAKE UNTIL YOU FOUND THE HOME?

IS THERE SOMETHING THAT YOU WOULD DO DIFFERENTLY?

WHAT ARE THE THREE MOST IMPORTANT "THINGS" YOU EXPECT FROM ME?

ARE THERE ANY QUESTIONS YOU WANT TO ASK OF ME?