



# Getting *Started*

## Basic Information

Names: \_\_\_\_\_

Best Phone Numbers: \_\_\_\_\_

Emails: \_\_\_\_\_

Current Address: \_\_\_\_\_

Number of Bedrooms: \_\_\_\_\_

Number of Bathrooms: \_\_\_\_\_

Choose One:

Single Family  Villa  Townhome  Apartment

Do you require a garage?  YES  NO EITHER ONE

What is prompting your move?

\_\_\_\_\_

When do you need to be in your new home?

\_\_\_\_\_

Are you pre-approved for a mortgage?

\_\_\_\_\_

What is your price range?

\_\_\_\_\_

If I found a home today that meets all of your needs and as many of your wants as possible, would you make an offer?

YES  NO



# Your Home *Wish List*

## Lifestyle

Who will be living in the home you purchase?

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Do you have any pets-If so, what breed are they, and what are their names?

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What are 3 features of your home that are a MUST HAVE

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1.

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2.

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3.

Is there anything I need to know that are DEAL BREAKERS for you as far as your home?

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## Location

Tell me about your ideal location.

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What is your maximum commute time and distance?

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What is your work address?

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Are schools important?

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# Your Home *Wish List*

Is there a particular view you are seeking  
(e.g., skyline, lake, Ocean View)?

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What else is important about your location?

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## General

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

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

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When people come to your home, what do you want your home to say  
about you?

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Do you want to have a swimming pool or hot tub?

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## Getting to Know you:

Birthdates \_\_\_\_\_

Do you have any children? \_\_\_\_\_

? \_\_\_\_\_

Anything else you would like me to know about you? \_\_\_\_\_

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# How Does Someone

*Win or Lose* **With You?**

## WIN

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

## LOSE

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

What do you feel you have the right to expect from me as your real estate consultant?

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What do you feel I have the right to expect from you as my client?

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