*Use this list of questions to better understand your expectations and preferences for purchasing your new home.*

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| --- | --- | --- | --- |
| **Contact Information** | | | |
| Name: | | Date: | |
| Current Address: | Phone #: | | Email: |

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| **General** | |
| Are you currently working with an agent/broker? If yes, who? |  |
| How long have you been looking for a house? |  |
| How many people will be moving with you? |  |
| Do you have children? If yes, how many? |  |
| Do you have any pets? If yes, what type and breed? |  |
| What is your preferred move in date and why? |  |
| Do you need to sell a property before you can purchase a new one? If yes, when and what’s its status? | Date: Status: |
| Are you currently leasing? If yes, when will your lease expire? | Date: |

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| **Home Preferences** | | | | | | |
| Will your new home require accommodations for anyone with disabilities, conditions, or other circumstances? Which ones? |  | | | | | |
| Would you rather purchase a… (Answer “Y” for Yes or “N” for No) | Single Family Home: | Townhouse: | | Condo: | | Multi- Generation: |
| Do you prefer to have a… (Answer “Y” for Yes or “N” for No) | Open Floor Plan: | | Formal Dining Room: | | Office: | |
| Patio/Deck: | | Attic: | | Basement: | |
| What are your top 3 desired neighborhoods? |  | | | | | |
| What’s the most northern, eastern, southern, and western streets you’re willing to live within? |  | | | | | |
| What is your price range? |  | | | | | |
| What’s your square footage preference? | For the house: | | | For the lot: | | |
| Do you have a preferred school or school district that you want to live near? If yes, which one? |  | | | | | |
| Which amenities do you require? |  | | | | | |

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| **Finances** | |
| Where are you employed? For how long? |  |
| Where is your spouse employed? For how long? |  |
| What is your combined annual income? |
| Have you set up financing? If not, would you like help? |  |
| Have you been pre-qualified or pre-approved by a lender? If yes, for how much? |  |
| What is the name and company of the lender that pre-qualified you? |  |
| Can you provide documentation of this amount? |  |
| How much cash can you put down to purchase your new home? |  |
| Have you set aside enough funds to cover earnest money? (In general, it’s around 1% of the purchase price) |  |
| What is your max offer limit? |  |
| What is your monthly desired budget for monthly payments? Including HOA, property taxes, utilities, etc. |  |

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| --- | --- |
| **Other Information** | |
| What websites do you use to view properties? |  |
| How did you hear about me? |  |
| If you have any other preferences or general notes that were not mentioned above, please write them down below: | |
|  | |

Thank you for completing this questionnaire!  
Please do not hesitate to give me a call if you have any questions.