

Buyer Consultation Questionnaire

Property Address:

REVIEW PREQUALIFICATION INFORMATION

Name Buyer 1 _____	Phone _____	Email _____
Name Buyer 2 _____	Phone _____	Email _____

- 1 Who is the primary contact with me and what is the best time and way to reach you?

- 2 What is prompting your move?

- 3 When do you need to be in your new home?

- 4 Are you preapproved for a mortgage?

- 5 What is your price range?

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

LIFESTYLE

- 7 Who will be living in the home you purchase?

- 8 Will anyone else be spending more than an occasional overnight stay (e.g., parents)?

- 9 Describe your lifestyle. What do you enjoy doing at home? (e.g., Do you do a lot of entertaining? How do you spend your time in the evenings and on the weekends?)

- 10 Does your home need to accommodate any special needs?

- 11 Do you have any pets?

LIFESTYLE (Cont...)

- 12 Do you have anything special that needs to be accommodated such as athletic equipment, fine art, large furniture, or a large collection?
- 13 When people come to your home, what do you want your home to say about you?
- 14 Is there anything I should know about your lifestyle that I have not asked?

LOCATION

- 15 IRS Form 4506-T — Request for tax transcript, completed, signed and dated.
- 16 Pay stubs covering the last 30 days.
- 17 W-2s for the past two years.
- 18 Federal tax returns (1040s) for the past two years.
- 19 Asset/bank statements — Most recent two months' statements for all accounts listed on the application (include all pages of the statement, including ones that are blank).
- 20 Written explanation if employed less than two years or employment gap exists within the last two years.

HOUSE - GENERAL

- 21 Credit explanation letter for late payments, collections, judgments, or other derogatory items in
- 22 Source of funds documentation for any large deposits on asset or bank statements.
- 23 Judicial decree or court order for each obligation due to legal action.

HOUSE - GENERAL (Cont...)

- 24 Bankruptcy/discharge papers for any bankruptcies in credit history.
- 25 Payment history for public utilities, phone, cable TV, car insurance, and other expenses.
- 26 Payment history for public utilities, phone, cable TV, car insurance, and other expenses.

HOUSE - STRUCTURE EXTERIOR

- 27 What type of home are you looking for (e.g., single-family, condo, townhouse, etc.)?
- 28 Approximately what size house are you looking for (square footage)?
- 29 How many stories?
- 30 What size lot would you like?
- 31 What architectural styles do you prefer?
- 32 What type of exterior siding will you consider?
- 33 Do you want a porch or deck?
- 34 What are you looking for in terms of a garage (e.g., attached, carport, etc.)?
- 35 What other exterior features are important to you?

HOUSE - INTERIOR

- 36 What kind of style do you want the interior of your home to have (e.g., formal, casual, cozy,
- 37 What kind of floor plan do you prefer (e.g., open vs. walls between all living spaces)?
- 38 In general, what are your likes and dislikes for the interior of your home?

BEDROOMS

- 39 How many bedrooms do you need?
- 40 How will each of those rooms be used?
- 41 What are your preferences for the master bedroom?

BATHROOMS

- 42 How many bathrooms do you need?
- 43 What are your needs for each of the bathrooms?

KITCHEN

- 44 What features must your kitchen have (e.g., breakfast area, types of appliances, etc.)?
- 45 What finishes do you want (e.g., counter tops, flooring, appliances, etc.)?
- 46 What are your likes and dislikes for the kitchen?

DINING ROOM

- 47 How many bathrooms do you need?
- 48 What are your needs for each of the bathrooms?

LIVING ROOM / FAMILY ROOM

- 49 Describe your likes and dislikes.

- 50 Do you want a fireplace?

- 51 What size room(s) do you have in mind?

- 52 What other rooms do you need or want?

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

SUMMARY

- 54 What are the top five things your home needs to have?
 - 1
 - 2
 - 3
 - 4
 - 5

- 55 Beyond those five things, what is something else you really want to have?

- 56 If you could have something else, what would that be?

- 57 If you could have one last thing to make this your dream home, what would that be?