

Terrabella Realty Home Buyer Questionnaire



Date

First Name Last Name

Home Phone Business phone Email

First Name Last Name

Home Phone Business phone Email

Home Address

City State Zip

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

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How many children do you have? Name & Ages

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Do you have any special school requirements?

Do you have any pets? Yes ☐ No ☐ Type of pet

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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 list the importance of each feature you would like in a home.

Choose the number that best fits your desires: 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 Maitn. 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 that I have not mentioned that is important to you?

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

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

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Are there any areas you would like to look at?

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What attracted you to the areas you named?

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What do you feel will be the key factors in your purchasing decision? (Price, terms, location, 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 or property 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, our relationship requires open communication. That way, the little problems that naturally come up buying a home can be handled easily and without stress. Is there anything you would like to tell me 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, who is the preferred contact?

When is the best time for me to call you?

When is the best time for you to look at property?

Do you understand how the real estate MLS works? Yes ☐ No ☐

Do you understand how an agent who finds you a home gets paid? Yes ☐ No ☐

If 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 with me to help you find a home? Yes ☐ No ☐

Comments:

I authorize Realtor® to contact me via telephone, fax and email regarding current and future real estate business.

Financial Information

If you need financing I can help you obtain the best interest rates and terms. To do so, 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 source of the money?

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

Loan Origination fees? Yes ☐ No ☐ Title Insurance? Yes ☐ No ☐ Professional Home Inspection? 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

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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

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Would you like me to recommend a mortgage representative who 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?

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

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