

Buyer Prequalification Sheet

Date: _____

Appointment Date: _____

Lead Source: _____

Appointment Time: _____

CONTACT INFO

Name: _____

Email: _____

Current Address: _____

Children? (Names/Ages): _____

Home Phone: _____

Cell Phone: _____

Work Phone: _____

Fax: _____

The best way to get in touch with you?: _____ Best times to call?: _____

Spouse Name: _____

Spouse Cell Phone: _____

Motivation

1. Are you already working with an agent? (check one) ☐ yes ☐ no

(If yes) Have you signed an agreement? ☐ yes ☐ no

(If yes) What is their name? _____

2. What is your motivation to buy? _____

3. What do you want to buy? _____

4. Will others live in the property with you? _____

5. Are you purchasing alone, or with others? _____

6. Is anyone else involved in the purchasing decisions? _____

7. How long have you looked for a property? _____

8. Have you seen anything that you like? ☐ yes ☐ no

(If yes) What did you find? Where is it located? _____

9. Did you make an offer? Why/Why Not? _____

10. What is your price range? _____

Current Situation

11. Do you currently rent or own? _____

If you own, do you need to sell your current property? _____

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Financing

If yes, are you working with an agent to sell your home? ☐ yes ☐ no

If you rent, when is your lease up? _____

12. When do you need to move? _____

13. What is your method of financing: cash or mortgage? _____

14. Have you been preapproved by a lender? ☐ yes ☐ no

Lender's Name: _____

Email: _____

Phone: _____

Mortgage Amount: \$ _____

Down Payment Amount: \$ _____

15. On a scale of 1 to 10, with 10 being extremely urgent, how motivated are you to sell your house? (circle one) 1 2 3 4 5 6 7 8 9 10

16. What would it take to become a 10? _____

17. Disc Profile: D I S C

Is there anything else that we haven't covered? _____
