

Home Buyer Questionnaire

Last Name (s): _____ Home Phone: (____) _____

First Name: _____ Work Phone: (____) _____ E-Mail _____@_____

First Name: _____ Work Phone: (____) _____ E-Mail _____@_____

Home Address:

City _____ State _____ Zip _____

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

How many children do you have? ____ What are their names: #1 _____ Age ____
#2 _____ Age ____ #3 _____ Age ____ #4 _____ Age ____

Do you have any special school requirements?

How many bedrooms would you like your home to have? _____ Baths? _____

Approximately how many square feet are you looking for? _____

What is the basic price range you would like to stay within? _____

What is the absolute highest you would consider spending? _____

Is there a minimum price you must pay to avoid capital gains taxes on your last home? Y__ No__

What is that minimum price you must pay? _____

Are there any areas you have in mind that you would like to look at?

What attracted you to this area(s)? _____



Please rate the importance of each feature that you would like in a home.

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 maint. 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 I have not mentioned that is important to you?

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

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

What do you feel will be the key factors in your purchasing decision? (Price, terms, locations, 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 before moving? Yes___ No___

Is that home currently listed for sale? _____ Asking price? _____

How long has it been on the market? _____

Who is it listed with? _____ Phone _____

Would you like me to show how I can help you sell your home, or if your home is not local can I refer you to one of my contacts in that area? Yes___ No___

My goal is to help make buying your home a positive experience. To do that we need open communication between us. That way the little problems that naturally come up in buying a home can be handled easily and without stress. Is there anything that you would like to tell me that you feel might be helpful in our working together? _____

When is the best time(s) for me to call you? _____

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

Financial Information

In order to help you obtain the best interest rates & terms, 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 be used only 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 _____

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 money coming from?

Do you understand how financing a home works? Yes___ No___ Closing costs?
Yes___ No___

Loan origination fees? Yes___ No___ Title insurance? 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. _____

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:_____

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? Y/N___

When would be a good time for a loan representative to call you?_____

What bills do you have over \$150.00 per month?

Car _____	Insurance _____
Car _____	Boat _____
Credit Card _____	Investments _____
Credit Card _____	Child Support _____
Credit Card _____	Alimony _____
Credit Card _____	Other _____
Other _____	Other _____

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

