

HOMEBUYER DETAILS CHECKLIST

1. Name: _____
2. Address: _____
3. Preferred Telephone: _____ E-mail: _____
4. Area(s) (locations) requested: _____
5. Approximate possession date: _____
6. Specifications:
 - a. Bedrooms _____
 - b. Baths _____
 - c. Garage _____
 - d. Basement _____
 - e. Style _____
 - f. Lot Size _____
 - g. Features: _____
 - h. Remarks: _____
 - i. Other Requirements: _____
7. Price range: _____
How was this determined: _____ Broker Pre-qualification
_____ Lender
_____ Other
8. What monthly mortgage amount would you feel financially comfortable paying? \$ _____
9. What amount are you intending to put toward the down payment?
\$ _____ Source: _____
* Is the buyer potentially eligible for any down payment assistance programs?
10. Have you already chosen, or do you have a preferred mortgage broker or lender?

11. Besides the highest price you're willing to offer for a property, is there any other confidential information you would prefer to keep private?
_____ Yes _____ No If yes, please state: _____
12. Has the Buyer Representation Agreement been provided and signed? _____ Date _____
13. Date the Buyer received a copy of the signed Buyer Representation Agreement _____
Date _____

Signatures:

Designated Agent

Buyer

Date

Date

Buyer

Date

FOR OFFICE USE ONLY

Source of Business:

☐ Personal referral ☐ Ad call ☐ Sign call ☐ Web/Social Media
☐ Floor call/walk-in ☐ Company referral ☐ Met at open house

How was the property located for the Buyer?

☐ The buyer asked to view a particular property.

☐ Property was found using a computer search based on the Buyer's criteria. (Attach search results, if applicable)

Properties and/or Areas Shown	Price	Date	Buyers Comments	Printed Listing Given
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____