

Your Home Search

Will this be your primary residence? vacation/investment? Will this be a 1031 Exchange? Y N

Will you be flipping? Y N How many homes do you own/have you purchased in the past? Current ____ Past ____

Will you be renting it? Y N Short-term Long-term When did you last purchase a home? _____

What is most important to you in a home? _____

How many bedrooms? _____ Will they all be used as bedrooms? _____

Any other special rooms, such as an office/study, family room, great room, media room etc? _____

Do they need to be on the same level? Does master need to be on main level? _____

How many baths? _____ Full? _____ 3/4? _____ 1/2? _____

Does the master need to have separate tub/shower and two sinks? _____

What style of home do you prefer? (ranch style, two-story, etc) _____

What architectural style do you prefer? (modern, mountain modern, old Tahoe, log, etc) _____

How many living areas? Living Room Formal Dining Family Room Rec Room

Do you require a view? (Lake, filtered, peek, mountains, forest, meadow) _____

What size garage? _____ How many parking spaces do you need? _____

Would you like a deck/more than one deck, patio, landscaping/no landscaping, front yard, back yard? _____

Are you looking for high/mid/low elevation? _____ How do you feel about driving in the mountains/snow? _____

Are schools important? _____ If yes, which ones? _____

Will you be commuting to work? _____ Is proximity a concern? _____

How do you feel about HOAs? Would you like a shared beach/pier/amenities in return for HOA fees? _____

In what area do you want to live? _____ Would you consider any other areas? _____

What hobbies or interests do you have that would come into play in purchasing a home? _____

Do you need to sell your current home before you purchase? _____

What do you think the value of your current home is? _____

If we found the right home for you today, would there be anything that could keep you from buying it? _____

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Your Home Search

(CONTINUED)

Who else will be involved in your purchase? _____

Have you seen any homes that fit your needs? _____

What is the timing of your move? _____

How long do you think you will live in this home? _____

When is the best time for you to look at homes? _____

How do you plan on paying for your home? _____

If you are getting a loan, have you been prequalified by your lender? Y N

Please provide the name and phone number of your lender: _____

If not, would you be open to me recommending some local lenders? Y N

What is your price range for your new home? _____

FINANCIAL INFORMATION

Where do you work? _____

How long have you been employed with this employer? _____

Including taxes and insurance, what monthly payments do you feel comfortable with? _____

How much cash do you have available for down payment? _____

Does this include closing costs? _____

Is there any problem with your credit that you are aware of? _____

Have you ever had a foreclosure or a bankruptcy? _____ If so, when? _____

ADDITIONAL INFORMATION

Is there anything else you'd like me to know? _____
