

# Buyer's Workbook

Things To Do Before,  
During And After You Move

real.

RESIDENTIAL

# Buyer Questionnaire

## First, we'll need to know the basics

1. Legal name

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2. Email address

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3. Best phone number to reach you

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4. Current mailing address

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5. Was there someone who referred you to me?

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6. Which of these best describes you?
- a. I am a first-time homebuyer
  - b. I am looking to downsize
  - c. I am looking for a larger home
  - d. I have previously owned a home but do not at the moment
  - e. Other:

## Let's discuss your current home

7. What is the ownership status of your current home?

- a. I'm renting my home
- b. I own my home
- c. I am living with a family member
- d. Other:

8. If renting, when does your lease expire?  
Is there flexibility in your move out date?

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9. If you own your home, do you need to sell it before closing on your next home?

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10. If there is a gap between your current and next home, do you have a temporary place to stay? (short term rental, with a family member/friend, hotel)

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## Let's discuss your next home

11. What is your timeline for finding your next home?

- a. Immediately
- b. Within 1 month
- c. Within the next 3 months
- d. Within the next 6 months
- e. Within the next year

12. Will you be the sole purchaser OR is someone else involved in the financial and/or decision making process? If yes, what is that person's name?

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13. What property are you looking for?

- a. Primary Residence
- b. Second/Vacation Home
- c. Investment Property

14. What type of property are you looking for?

- a. Single-family home
- b. Condo/co-op
- c. Apartment
- d. Other:

15. How many bedrooms are you looking for?

- a. Studio/None
- b. 1 Bedrooms
- c. 2 Bedrooms
- d. 3 Bedrooms
- e. 4 Bedrooms
- f. 5+ Bedrooms

# Buyer Questionnaire

16. How many bathrooms are you looking for?

- a. 1 full bathroom
- b. 1 full, 1 half bathrooms
- c. 2 full bathrooms
- d. 2 full, 1 half bathrooms
- e. 3 or more bathrooms

17. What property condition(s) are you comfortable purchasing?

- a. New construction
- b. Move-in ready
- c. Light/cosmetic updating
- d. Shell/rehab condition

18. Are there any other important aspects of your life your future home or property should support?

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19. Are there any specific neighborhoods you are interested in exploring?

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**Almost done! Lastly, let's cover some financial questions.**

20. Have you already been pre-approved for a mortgage? If so, by which company?

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21. How much would you be comfortable paying monthly? (with taxes, mortgage, insurance)

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22. What price range are you looking in?

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23. How much of a down payment are you considering?

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24. Do you have any up-front budget/ financial concerns?

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25. Finally, are there any other questions or concerns you would like to discuss when we meet?

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# My Dream Home Wish List



## Features

- |                       |                           |
|-----------------------|---------------------------|
| _____ Bedrooms        | _____ Home office         |
| _____ Bathrooms       | _____ Elevator            |
| _____ Outdoor Space   | _____ Full service        |
| _____ Pet Friendly    | _____ Gym                 |
| _____ Parking         | _____ New Construction    |
| _____ Minimum Sq. Ft. | _____ Move-in Ready       |
| _____ Maximum Price   | _____ I'll do my own work |

- |             |                     |                 |
|-------------|---------------------|-----------------|
| _____ Condo | _____ Single Family | _____ Townhouse |
|-------------|---------------------|-----------------|

## Location



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