NEW BUYER CHECKLIST

SUMMA® REALTY

BUYER CONTACT INFO

BUYER NAME: _____

ADDRESS: _____

PHONE: _____

EMAIL: _____

BUSINESS: _____

EMERGENCY CONACT (name & number): _____

BUYER PREFERENCES

COMMUNICATION BY: (check all that apply)	PHONE ☐	EMAIL ☐
SHOWING SCHEDULE: (check all that apply)	WEEKLY ☐	DAILY ☐
TRANSACTION UPDATES: (check all that apply)	WEEKLY ☐	DAILY ☐

I authorize the release of my email address to third parties directly involved in the closing of any transaction, for the strict purpose of transaction updates and communication.

BUYER: _____ DATE: _____

BUYER: _____ DATE: _____

BUYER QUESTIONNAIRE

1) Have you selected a REALTOR®?

2) How much time do you have today?

3) When is the best time to look at property?

4) If you find a home that meets your criteria are you ready to proceed?

5) Is anyone else involved in the decision making process?

6) What is motivating you to buy a home now?

7) When would you ideally like to be moved?

8) Do you have any obstacle to overcome before making a purchase? (job transfer, settlement, etc)

9) Does anyone in your family have a real estate license?

10) Have you recently made an offer on any home?

11) What are you looking for in a home?

12) Have you seen any properties that you liked?

13) What areas are you most interested in?

14) How many homes have you looked at?

15) How have you been looking? (online, drive-by's, open houses, etc)

16) How long have you been looking?

17) How many homes have you owned?

18) What are your favorite websites to view property?

BUYER PROPERTY REQUIREMENTS & AMENITIES

1) Location:

2) Lot size:

3) Home Specifications:
    a) Bedrooms:
    b) Bathrooms:
    c) Garage:
    d) Square Footage:

4) Special Requirements:
    a) NEED to have:
    b) WANT to have:

5) Tell me about you present home:
    a) What attracted you to it:

    b) What don't you like about it now?

BUYER FINANCIAL PROFILE

1) Have you been pre-approved by a lender?

2) If yes, who have you spoken with?

3) How much cash (downpayment) will you ideally like to invest into your new home?

4) Do you have a budget for monthly payments?

5) Is anyone helping you out financially with the purchase?

6) Are you planning on using your credit (for other things) any time prior to the purchase?

7) What price range are you qualified for?