



NEW BUYER CLIENT QUESTIONNAIRE

Let's find your next home

A few quick questions to kick off your search. The more you share, the more precisely we can match you to the right homes—and the less time you'll spend on ones that miss the mark.

1 ABOUT YOU

FULL NAME(S)

BEST PHONE

EMAIL

CURRENT ADDRESS / CITY

PREFERRED WAY TO REACH YOU

☐ Call ☐ Text ☐ Email

2 TIMELINE & SITUATION

WHEN ARE YOU HOPING TO MOVE?

☐ ASAP ☐ 1-3 months ☐ 3-6 months ☐ 6-12 months ☐ Just exploring

WHICH BEST DESCRIBES YOU? (CHECK ALL THAT APPLY)

☐ First-time buyer ☐ Need to sell first ☐ Relocating ☐ Upsizing ☐ Downsizing ☐ Investment

3 BUDGET & FINANCING

TARGET PRICE

\$

COMFORTABLE MONTHLY PAYMENT

\$

HOW WILL YOU PURCHASE?

PRE-APPROVAL STATUS

☐ Pre-approved ☐ In progress ☐ Need a lender ☐ Paying cash

A little more detail

4 THE HOME

BEDROOMS (MIN)

BATHROOMS (MIN)

APPROX. SQUARE FOOTAGE

PROPERTY TYPE (CHECK ALL THAT APPLY)

Single-family

Townhome

Condo

Multi-family

Land / new build

Open to any

CONDITION PREFERENCE

Move-in ready

Some updates OK

Happy to renovate

5 LOCATION

PREFERRED AREAS, NEIGHBORHOODS, OR TOWNS

ANYTHING TIED TO LOCATION? (COMMUTE, SCHOOLS, FAMILY, WORK)

6 PRIORITIES

TOP MUST-HAVES — THE DEAL-MAKERS

NICE-TO-HAVES — THE WISH LIST

DEAL-BREAKERS — WHAT TO AVOID

ANYTHING ELSE WE SHOULD KNOW?