****

**Sonya Brown-Marshall, Realtor** **sonya@gejproperties.com**

**Commercial Real Estate Purchase Intake 832.216.3780**

Please complete the questionnaire.

**About the client:**

|  |  |
| --- | --- |
| Client Name **\*** |  |
| Business Name |  |
| Phone **\*** |  |
| Email **\*** |  |
| Best way to contact |  |
| Best time to call |  |
| Referred by |  |
| Are you working with another agent? | Yes  No  |
| Would you like our firm to represent you in your search, negotiations and purchase? | Yes  No  |

**About the property:**

|  |  |
| --- | --- |
| Where is your ideal property location (county/ area/ city/ etc.)? |  |
| Ideal building size and layout? |  |
| Property type? | Multi-family  Single-family Office  Retail Industrial  Hotel/Motel Senior Housing  Vacant Land Mixed-Use  Other  |
| Property size? |  |
| Lot size? |  |
| Any particular type of area/neighborhood/demographics? |  |
| Traffic requirements (main road, secondary, etc)? |  |
| Client/customer access (foot traffic)? |  |
| Space requirements (a must have). Check all that applies. | Open Space  Offices First Floor  Higher Floors Kitchen  Conference Room Loading Dock  Drive-in/Rollup Door Security  Storage Space Internet Connection  Phone Highway Access  Freight Access Refrigeration  Fire Sprinklers Water Access  Street Frontage Bathroom  Sinks Hazmat Storage  Delivery Parking American With Disabilities (ADA) Compliance  |
| Ceiling Height |  |
| Forklift Height |  |
| Electrical Requirements |  |
| Number of Parking Spaces |  |

**About the purchase:**

|  |  |
| --- | --- |
| What are the goals and objectives of the purchase? |  |
| What is the range of purchase price? |  |
| How much cash is available for the purchase? |  |
| Where does the source of cash come from? |  |
| How much time is required to liquidate assets, if any, to ensure the cash is available in the U.S.? |  |
| Is the purchase part of a 1031 Exchange? | Yes  No  |
| What is the average bank account(s) balance in the last six months? Explain any large deposits. |  |
| How is the purchaser's credit history? |  |
| What is the purchaser's credit score? |  |
| Are the last two years tax returns available? | Yes  No  |
| Are the current profit & loss (P & L) states and balance sheets available? Please explain. | Yes  No  |
| How will the property be titled? |  |
| Please list other currently owned assets and/or real estate. |  |
| What are the most important factors in the purchase (price, location, payments, terms of loan, return on investment, cap rate, etc)? |  |