

# WALTER-JAMES REALTY FIRM

Guiding You Home. Every Step of the Way.



## HOMEBUYER PLANNING WORKSHEET

Use this worksheet to help you clarify your goals, priorities, and questions as you plan to buy a home.

Name: \_\_\_\_\_ Date: \_\_\_\_\_ Email: \_\_\_\_\_

Phone: \_\_\_\_\_ Best Time to Contact: \_\_\_\_\_



### 1. FINANCIAL PREPARATION

Steps I plan to take to get financially ready:

- Check and improve my credit score
- Save for down payment
- Save for closing costs
- Pay down debt
- Build or maintain emergency savings
- Get pre-approved for a mortgage
- Review my budget
- Other: \_\_\_\_\_

Notes:

---

---

---



### 2. PROPERTY FEATURES IMPORTANT TO ME

Check all that are important to you.

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Price               | <input type="checkbox"/> Home Office / Workspace | <input type="checkbox"/> Natural Light          |
| <input type="checkbox"/> Size (Square Feet)  | <input type="checkbox"/> Garage / Parking        | <input type="checkbox"/> Updated Kitchen        |
| <input type="checkbox"/> Number of Bedrooms  | <input type="checkbox"/> Yard / Outdoor Space    | <input type="checkbox"/> Updated Bathrooms      |
| <input type="checkbox"/> Number of Bathrooms | <input type="checkbox"/> Patio / Deck            | <input type="checkbox"/> Walk-In Closet         |
| <input type="checkbox"/> Single-Story Home   | <input type="checkbox"/> Storage Space           | <input type="checkbox"/> Fenced Yard            |
| <input type="checkbox"/> Two-Story Home      | <input type="checkbox"/> Energy Efficiency       | <input type="checkbox"/> Home Security          |
| <input type="checkbox"/> New Construction    | <input type="checkbox"/> Laundry Room            | <input type="checkbox"/> Accessibility Features |
| <input type="checkbox"/> Move-In Ready       | <input type="checkbox"/> Open Floor Plan         | <input type="checkbox"/> Other: _____           |

Additional Features or Must-Haves:

---

---

---



### 3. BUDGET PLANNING

Target Home Price: \_\_\_\_\_

Down Payment Amount: \_\_\_\_\_

Closing Costs (Est.): \_\_\_\_\_

Monthly Mortgage (Est.): \_\_\_\_\_

Property Taxes (Est.): \_\_\_\_\_

Homeowners Insurance (Est.): \_\_\_\_\_

Other Monthly Costs (Est.): \_\_\_\_\_

**Total Monthly Housing Budget:** \_\_\_\_\_

*Tip: Keep total housing costs (including taxes and insurance) at a comfortable level within your budget.*



### 4. QUESTIONS ABOUT BUYING A HOME

Use this space to write down questions you have for your real estate professional.

---

---

---

---

---

---

---

---



### 5. NOTES & NEXT STEPS

Use this space for notes, ideas, and next steps.

---

---

---



**EQUAL HOUSING OPPORTUNITY PROVIDER**  
We do not discriminate on the basis of race, color, religion, sex, handicap, familial status, national origin, or any other protected characteristic.

*This is an educational resource only;  
consult professionals as needed.*



REALTOR®