BUYER QUESTIONNAIRE

Use it before the first call or at the first meeting. Ask only what you will use, and let the buyer skip anything they prefer not to answer.

Buyer details

Buyer name(s) _____

Phone _____ Email _____

Best way to reach you _____ Best time _____

How did you hear about me _____

Timeline and situation

Ideal move date _____ Reason for moving _____

Renting or owning now _____

Lease end date (if renting) _____ Need to sell a home first? (Y/N) _____

Budget and financing

Ask only what you will use, and do not give financial advice. Refer financing questions to a licensed lender.

Price range you are comfortable with _____

Pre-approved? (Y/N) _____ Lender (if any) _____

The home you want

Areas or neighborhoods _____

Property type _____ Bedrooms and bathrooms _____

Minimum size (sq ft) _____ Parking needs _____

Must-haves: the home needs these.

_____

_____

_____

Nice-to-haves: good if the home has them.

_____

_____

Deal-breakers: the buyer would not consider a home with these.

_____

Getting around

Places you travel to often (work, family, other) _____

Things nearby that matter to you (parks, transit, shops) _____

Working with an agent

Working with another agent? (Y/N) _____

Buyer agreement in place? (Y/N) _____

Follow your brokerage's rules about buyer representation agreements and about working with a buyer who already has an agent.

Showings

Days and times you are free for showings _____

Anyone else who should attend _____

Fair housing

Ask about the home and what the buyer needs from it. Do not ask about or record anything related to race, color, religion, sex, national origin, disability or family status, or other characteristics protected where you work, and do not steer buyers toward or away from areas. Follow your brokerage's policies.

Notes and next steps

_____

_____

_____

Next step _____ **Follow-up date** _____