

# Buyer Lead Sheet

Date: \_\_\_\_\_ Lead Source/Property that prompted call: \_\_\_\_\_

CONTACT INFO	
Name _____	
Email _____	
Street Address _____	
Children's Names: _____ _____	
Home Phone _____	Cellphone _____
Work Phone _____	Fax _____
What is the best way to get in touch with you?	What times are best?

## Buyer Consultation Prequalification Questions

1. Has an agent taken you out and shown you any properties? € YES € NO  
If yes, how's that going? \_\_\_\_\_
2. Is there anybody else buying the home with you? \_\_\_\_\_  
\_\_\_\_\_
3. Who will be living in your home? \_\_\_\_\_  
\_\_\_\_\_
4. How long have you been looking for a home? \_\_\_\_\_  
\_\_\_\_\_
5. I'm just curious, why are you moving? \_\_\_\_\_  
\_\_\_\_\_

6. Are you renting or do you own now? € RENT € OWN

*Renter:* Do you know when your lease is up? \_\_\_\_\_

*Owner:* Do you need to sell your current home before you buy your next home? "YES" "NO"

*If yes:* Have you signed a listing agreement with a real estate agent to sell your home?

€ YES "NO"

*If no:* When would be a good time for us to get together so I can give you a free market analysis on your home? \_\_\_\_\_

7. Are you going to be paying cash or will you be getting a mortgage for the purchase of your home? € CASH "MORTGAGE"

*Mortgage:* Have you already been preapproved by a lender? \_\_\_\_\_

*If yes:* Who are you working with? \_\_\_\_\_

What is the amount you are preapproved for? \_\_\_\_\_

What will your down payment be? \_\_\_\_\_

*If you want to recommend a lender.* I have three trusted lenders who always provide top quality service. Would you like their contact information?

8. What price range are you comfortable with? \_\_\_\_\_

9. Is there anyone else who will be involved in your home buying decision? \_\_\_\_\_

10. On a scale of 1 to 10 with 10 meaning you must buy a home as quickly as possible and 1 meaning you are not sure you'll really buy anything, how would you rate yourself? \_\_\_\_\_

*Anything less than 10:* What would it take for you to become a 10? \_\_\_\_\_

11. When do you need to be in your new home? \_\_\_\_\_

12. I'd love to help you buy a home. In order to help you find a perfect home, all we need to do is set an appointment (with all of the decision makers) so I can help you get what you want in the time you want. What is a better time for us to meet?

Appointment date and time: \_\_\_\_\_

# Buyer Consultation Questionnaire

## Lifestyle Example

1. Who will be living in the home you purchase?
2. Will anyone else be spending more than an occasional overnight stay (e.g., parents)?
3. Describe your lifestyle. What do you enjoy doing at home? (e.g., Do you do a lot of entertaining? How do you spend your time in the evenings and on the weekends?)
4. Does your home need to accommodate any special needs?
5. Do you have any pets?
6. Do you have anything special that needs to be accommodated such as athletic equipment, fine art, large furniture, or a large collection?
7. When people come to your home, what do you want your home to say about you?
8. Is there anything I should know about your lifestyle that I have not asked?

## Location

1. Tell me about your ideal location.
2. What is your maximum commute time and distance?
3. What is your work address?
4. Are schools important?
5. Is there a particular view you are seeking (e.g., skyline, lake, mountains)?
6. What else is important about your location?

## House – General

1. Do you have a preference for when the house was built?
2. Do you want a house in move in condition, or are you willing to do some work on it?
3. When people come to your home what do you want your home to say about you?
4. Do you want to have a swimming pool or hot tub?
5. Are you looking for any structures such as a greenhouse or shed?

### **House – Structure/Exterior**

1. What type of home are you looking for (e.g., single-family, condo, townhouse, etc.)?
2. Approximately what size house are you looking for (square footage)?
3. How many stories?
4. What size lot would you like?
5. What architectural styles do you prefer?
6. What type of exterior siding will you consider?
7. Do you want a porch or deck?
8. What are you looking for in terms of a garage (e.g., attached, carport, etc.)?
9. What other exterior features are important to you?

### **House – Interior**

1. What kind of style do you want the interior of your home to have (e.g., formal, casual, cozy, traditional, contemporary)?
2. What kind of floor plan do you prefer (e.g., open vs. walls between all living spaces)?
3. In general, what are your likes and dislikes for the interior of your home?

### **Bedrooms**

1. How many bedrooms do you need?
2. How will each of those rooms be used?
3. What are your preferences for the master bedroom?

### **Bathrooms**

1. How many bathrooms do you need?
2. What are your needs for each of the bathrooms?

### **Kitchen**

1. What features must your kitchen have (e.g., breakfast area, types of appliances, etc.)?
2. What finishes do you want (e.g., countertops, flooring, appliances, etc.)?
3. What are your likes and dislikes for the kitchen?

**Dining Room**

1. Would you like the dining room to be part of the kitchen configuration? What about the living room?
2. What size dining room table do you have?

**Living Room / Family Room**

1. Describe your likes and dislikes.
2. Do you want a fireplace?
3. What size room(s) do you have in mind?
4. What other rooms do you need or want?
5. What else should I know about the inside of the house you are looking for?



# The Five Must-Haves

1. What are the top five things your home needs to have?

(Note: You will also write these down in their buyer's guide and use them during the showing process.)

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

2. Beyond those five things, what is something else you really want to have?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. If you could have something else, what would that be?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. If you could have one last thing to make this your dream home, what would that be?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_