



WE ARE JUST A FEW QUESTIONS AWAY
FROM FINDING YOUR NEW HOME!

Prospects Name: _____ Spouse: _____
 Address: _____ City: _____ State: _____ Zip: _____
 Home Phone: _____ Work/Cell: _____ Email: _____
 Own: _____ Rent: _____ Lease Expires: _____ Rent Amount: _____
 If own, is house on the market? YES NO If yes, are they buying with agent? YES NO
 If own, do they have to sell first? YES NO Have you been looking for a home long? _____
 If own, is Listing Sheet filled out? YES NO If NO, why: _____

Criteria **Motivation Level** 1 2 3 4 5 (1 low 5 high) **Working with another Agent?** YES NO
Best Time to look: Day Evening Weekday Weekend
 Price Range: _____ to _____ Time Frame: _____
 Desired Areas: _____
 # Bedrooms: _____ # Bathrooms: _____ #Garage: _____ Style of Home: _____
 Any special needs? _____
 What are the three things you are looking for in a Realtor? _____

Initial Consultation Date: _____ **Time:** _____ **Follow-up on:** _____
NOTES: _____

| Follow Up Date And Time | Status | Follow Up Date And Time | Status |
|----------------------------|--------|----------------------------|--------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Mortgage Information
 Mortgage Company: _____ LO: _____
 Phone: _____ Approved Amount: _____
 Amount of Down Payment? _____ Source of Down Payment _____

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