

INTAKE FORM - BUYER



Name(s):

Phone Number:

Email Address:

1. Will you be purchasing the home by yourself or with someone?
2. What price range are you looking in?
3. What area(s) are you interested in?
4. How long have you been looking for a home?
5. Have you seen anything you've liked?
6. What is creating the move?
7. When do you hope to be in your new home?
8. What features do you **need** in your new home?
9. What features do you **want** in your new home?
10. Have you talked to a lender or is that something I can help you with?
11. Talk about the speed of market/ the need for a pre-approval in order to compete in this market
12. Are you working with an agent?
 - **YES** - Is it a ShorewestAgent? (If yes ... Great! They will take great care of you and I will pass along the information we discussed to them today)
 - **YES** - (If NOT a Shorewest agent) Do you have a Buyer Agency Agreement with them?
 - **YES** - Do you know the expiration date of your Buyer Agency Agreement?
I can work with you, however you may be obligated to pay them commission.
 - **NO** - Do you know the benefits of Buyer Agency?
There are three levels of agency and service for you to choose from, with buyers agency being the highest form. I will send you a document that explains the 3 levels and we can decide which fits your needs.
13. Do you currently own a home?
 - **YES**- Is your home currently on the market?
 - **YES**- Would you like information about the home selling process? YES- Do you need to sell your home in order to buy a new home?
 - Offer to meet with them to go over today's market and process for selling a home. It is not the same. It is not the same market as 5, 10, 15 years ago and many things have changed in the process)
14. With the information I have gathered today, I will be setting you up on a search that will send you properties as soon as they come on the market. You can look at them and let me know if you would like to see them.
 - Tell them how you can inform them about homes before they hit the market because of our Pre-MLS system.
15. Summarize what will happen and what they will be receiving from you.