

Intake Form - Buyer



Rapport Building: How did you get my name? If it alright with you, I would like to ask you a few questions and then set up a time for us to get together. These questions are to better prepare us for our house hunting trips.

Name(s): _____

Phone Number: _____

Email Address: _____

Home Address: _____

1. Do you own at that address or currently rent? _____
2. (If they rent) Will this be your first home? _____
3. Will you be purchasing the home by yourself or with someone? _____
4. What price range are you looking in? _____
5. What area(s) are you interested in? _____
6. How long have you been looking for a home? _____
7. Have you seen anything you've liked? _____
8. What is creating the move? _____
9. When do you hope to be in your new home? _____
10. What features do you **need** in your new home? _____
11. What features do you **want** in your new home? _____
12. Have you talked to a lender or is that something I can help you with? _____

13. Talk about the speed of market/ the need for a pre-approval in order to compete in this market

14. 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.

15. (If own a home in Question #2) Do you need to sell your home prior to purchasing?

- **YES**- Is your home currently on the market?
- **YES**- Would you like information about the home selling process?
- Can we find a time to meet and go over today's market and process for selling a home. It is not the same market as 5, 10, 15 years ago and many things have changed in the process.

16. 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.

17. Summarize what will happen and what they will be receiving from you.