

BUYERS

ONBOARDING QUESTIONNAIRE



Please take a moment to answer the following questions to help us deliver an extraordinary home-buying experience that exceeds your expectations.

DATE:

CLIENT NAME(S):

CURRENT ADDRESS:

PHONE/EMAIL:

PREFERRED TIME AND CONTACT METHOD:

ON A SCALE OF 1 TO 10, HOW READY DO YOU FEEL TO PURCHASE YOUR NEXT HOME?
(1 = Just starting to explore, 10 = Fully ready to buy)

PLEASE TELL US A BIT ABOUT YOU

YOUR BIRTHDAY(S)...SO WE CAN CELEBRATE THEM WITH YOU!

FAVORITE RESTAURANT:

FAVORITE FOOD/DRINK:

FAVORITE ACTIVITY:

PET NAME(S), (DOG/CAT), (BREED/SIZE):

SOCIAL HANDLES:
(share only what you feel comfortable with)

YOUR CURRENT HOME

TELL US ABOUT THE TYPE OF HOME YOU CURRENTLY LIVE IN:

YOUR CURRENT HOME (CONTINUED)

TELL US ABOUT YOUR CURRENT NEIGHBORHOOD AND WHAT YOU LIKE MOST ABOUT IT:

WHAT DO YOU LOVE MOST ABOUT YOUR CURRENT HOME:

WHAT WOULD YOU LIKE TO CHANGE:

YOUR IDEAL HOME

LOCATION/NEIGHBORHOODS:

STYLE OF HOME/CONDO:

TOP FEATURES:

MUST-HAVES:

THINGS TO AVOID:

NUMBER OF BEDS/BATHS/PARKING REQUIREMENTS:

BUDGET RANGE:

HOW WILL YOU FINANCE YOUR HOME? ARE YOU PRE-APPROVED:
(if not, would you like a loan officer referral?)

DO YOU NEED TO SELL YOUR CURRENT HOME BEFORE CLOSING ON YOUR NEXT HOME:

MOVING TIME FRAME:

WHAT IS THE MOST VALUABLE SERVICE WE CAN PROVIDE TO YOU THROUGHOUT THIS PROCESS:
(examples: exclusive vendor access, prompt and proactive communication, expert guidance or something else)