

CLIENT

MEETING INFO

How did you hear about us? _____

If referred from a past client, please share their information so we can thank them.

Are you currently working with an agent? ☐ YES ☐ NO

Partner/Spouse

Name: _____ Name: _____

Email: _____ Email: _____

Phone: _____ Phone: _____

Preferred Contact: ☐ CALL ☐ EMAIL ☐ TEXT

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Current Address: _____

Do you own the home or are you renting? ☐ RENT ☐ OWN

If yes do you need to sell this home? ☐ YES ☐ NO

Do you have a current lease? ☐ YES ☐ NO End of lease? _____

Is this your first home purchase? _____

What is the ideal timeframe for your move? _____

How long do you plan on staying in the home? _____

Who else will be living in the home?

Name: _____ Age: _____ Name: _____ ☐ DOG ☐ CAT

Name: _____ Age: _____ Name: _____ ☐ DOG ☐ CAT

Name: _____ Age: _____ Name: _____ ☐ DOG ☐ CAT

Have you met with a lender? ☐ YES ☐ NO Whom? _____

If not, we prefer that you get pre-approved before our meeting.

Can we send you someone to contact? ☐ YES ☐ NO

We would like to set an appointment in person or by Zoom to answer your questions and get started.

What works for you?

☐ IN-PERSON
☐ ZOOM

DATE

TIME

