

# BUYER INFORMATION SHEET

**Buyer Agent:** \_\_\_\_\_ **Date/Time Received:** \_\_\_\_\_  
**Is the Appointment completed?** ☐ Yes ☐ No  
**Prospect is:** ☐ Selling ☐ Buying ☐ Both **Listing Agent Assigned:** \_\_\_\_\_  
**Lead Source:** \_\_\_\_\_

**Prospect's Name:** \_\_\_\_\_ **Spouse:** \_\_\_\_\_  
**Tell me about your family:** \_\_\_\_\_  
**Current Address:** \_\_\_\_\_ **City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_  
**Home Phone:** \_\_\_\_\_ **Work:** \_\_\_\_\_ **Cell:** \_\_\_\_\_  
**E-mail:** \_\_\_\_\_  
**What is your mailing address?** \_\_\_\_\_  
    ▶ **If Address, did you mail business card?** ☐ Yes ☐ No

## **LOCATION:**

**Desired Area(s):** \_\_\_\_\_  
**School Preference:** \_\_\_\_\_

**PRICE:** \$ \_\_\_\_\_ to \$ \_\_\_\_\_

**MOTIVATION:** Motivation Level: (low) 1 2 3 4 5 (high)

**Do you currently** ☐ **Own, or** ☐ **Rent?** Lease Expires: \_\_\_\_\_ Rent Amount: \$ \_\_\_\_\_  
If own, is house on the market? ☐ Yes ☐ No If YES, are they buying with that agent? ☐ Yes ☐ No  
If own, do they have to sell first? ☐ Yes ☐ No How long looking for a home? \_\_\_\_\_  
If own, is listing sheet filled out? \_\_\_\_\_ ☐ Yes ☐ No  
If NO, why? \_\_\_\_\_

**Lead Status (Time Frame):** ☐ 30 Days or less ☐ 30-60 Days ☐ 60 days – 1 year ☐ 1 Year +

**WORKING WITH ANOTHER AGENT?** ☐ Yes ☐ No If YES, is there a signed agrmnt? ☐ Yes ☐ No

What are the three things you are looking for in an agent or real estate team?

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

**MORTGAGE:** **Lender Name:** \_\_\_\_\_ Will the buyer be paying cash? ☐ Yes ☐ No

If NO, do they require a lender referral? ☐ Yes ☐ No If YES, referred to: \_\_\_\_\_

**HOME CRITERIA:** # Bedrms: \_\_\_\_\_ # Baths: \_\_\_\_\_ # Living: \_\_\_\_\_ # Dining: \_\_\_\_\_ Garage: \_\_\_\_\_  
Stories: \_\_\_\_\_ Sq. Ft: \_\_\_\_\_ Lot Size: \_\_\_\_\_ Age of Home: \_\_\_\_\_ Style: \_\_\_\_\_

**Special Needs/Must-haves:** \_\_\_\_\_

**Type of Home:** \_\_\_\_\_

**CLOSE FOR THE APPOINTMENT:** Best time: ☐ Day ☐ Night ☐ Weekday ☐ Weekend

**Appointment Set (Date/Time):** \_\_\_\_\_

GREAT! Let me take a moment to make sure I have all the information I need.

**NOTES:** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_