



# BERKSHIRE HATHAWAY | California Properties HomeServices

## BUYER QUESTIONNAIRE

In an effort to ensure we will be able to serve you in the best way possible,  
please complete this questionnaire and email or fax back  
to our office prior to our initial meeting.

Last Name \_\_\_\_\_ First Name \_\_\_\_\_

B-day \_\_\_\_\_

Cell/Work Phone: (\_\_\_\_) \_\_\_\_\_

Email: \_\_\_\_\_

Spouse/other \_\_\_\_\_ First Name \_\_\_\_\_

B-day \_\_\_\_\_

Cell/Work Phone: (\_\_\_\_) \_\_\_\_\_

E-mail: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Home Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

To help you achieve your goals in relation to buying a home we need to ask you some questions  
that will help us understand how we can serve you best. What are the reasons you are interested  
in finding a new home?

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If you have children, please list their name(s):

First: \_\_\_\_\_ Age: \_\_\_\_\_

First: \_\_\_\_\_ Age: \_\_\_\_\_

First: \_\_\_\_\_ Age: \_\_\_\_\_

First: \_\_\_\_\_ Age: \_\_\_\_\_

Do you have any special school requirements?

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Do you have any pets?                      Yes                      No  
Name(s) and type of pets:

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What are your hobbies? And or your children's activities?

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## HOUSE REQUIREMENTS

Approximately how many square feet of living space do you require? \_\_\_\_\_

Number of bedrooms? \_\_\_\_\_ Number of bathrooms? \_\_\_\_\_

Yard Size? \_\_\_\_\_

What is the price range you would like to stay within?

\$ \_\_\_\_\_ to \$ \_\_\_\_\_

Maximum monthly payment you can afford: \$ \_\_\_\_\_

What is the absolute highest you would consider spending if you found the perfect house?

\$ \_\_\_\_\_

Describe the things you liked most about your previous home(s).

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Please rate the importance of each feature that you would like in your home, town home, or condo.

1 being not important. 5 being very important.

Location	Score	Interior	Score	Exterior	Score
Close to parks		Family room		Entertainment area	
Close to work		Floor covering preference		Low maintenance yard	
Close to public Transportation		Closet space		Pool/spa	
Close to highways		Den		BBQ area	
Close to schools		Dining room		Noise – less is better	
Close to shopping		Fireplace		Size of yard	
Family Neighborhood		Garage size			
View		Laundry location			
Privacy		Modern Kitchen			
Single vs. two stories		Open feeling		<b>LIST &amp; RANK TOP 5 FEATURE PRIORITIES:</b>	
Other:		Size of bedrooms		1)	
		Updated baths		2)	
		Workshop in garage		3)	
				4)	
				5)	

Is there a special feature that has not been mentioned and is important to you?

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Please describe what you would consider your ideal home to be; i.e. floor plan, decor, yard, style, and amenities.

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About your lifestyle—what do you see yourself doing in your new home? (Entertaining, relaxing, raising a family)

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Are there any neighborhoods/ areas you have in mind that appeal to you?

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What attracted you to these areas?

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What do you feel will be the key factors in your purchasing decision? (Price, terms, locations, etc.)

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To what extent have you already done research for your home purchase? (Open houses, online browsing, etc.)

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Have you seen any homes that appeal to you? If so, Please list the properties.

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When do you need to be in your new home?

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What will you do if you do not find a home in that time frame?

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Have you previously owned a home or real estate? Yes / No

Do you need to sell another home before buying? Yes / No

Is that home currently listed for sale? Yes / No

If yes, how much is it listed for? \_\_\_\_\_

With – Agent/Company \_\_\_\_\_

Phone \_\_\_\_\_

How long has your home been on the market? \_\_\_\_\_ Any Offers? Yes / No

## COMMUNICATION

Our goal is to ensure that your home buying experience is an incredibly positive and as stress free as possible. Instilling an open line of communication will ensure this to be a smooth process.

Is there anything that you feel would be helpful in our working together?

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Have you worked with a Realtor in the Past? Yes / No

If so, how was your experience? \_\_\_\_\_

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What do you expect from your realtor? \_\_\_\_\_

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Do you have a preference as to whom our main contact should be? Yes / No

If yes, who is the preferred contact?

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When is the best time(s) to reach you? \_\_\_\_\_

Preferred number/email \_\_\_\_\_

Preferred Days \_\_\_\_\_ Preferred Times \_\_\_\_\_

When scheduling appointments to view properties, what times work best for you?

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## EMPLOYMENT INFORMATION

Your Occupation: \_\_\_\_\_

Who is your current employer: \_\_\_\_\_

Years \_\_\_\_\_

Business Address \_\_\_\_\_

Spouse/Other's Occupation: \_\_\_\_\_

Spouse/Other's current employer: \_\_\_\_\_

Years \_\_\_\_\_

Business Address: \_\_\_\_\_

## FINANCING

Do you understand how financing a home works? Yes / No / Somewhat

Closing costs? Yes / No / Somewhat

Will this be an all-cash purchase? Yes / No

How much would are you planning to put towards a *down payment*? \$ \_\_\_\_\_

What is the source of your down payment? (401K, home sale proceeds, gift, etc)

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

Loan Origination fees? Yes / No / Somewhat

Title Insurance? Yes / No / Somewhat

Would you like information sent to you about any of these items? Yes / No

If so which items you would like more information on:

\_\_\_\_\_

Have you spoken with a lender? Yes / No

Have you been pre-approved for a loan? Yes / No

What is the maximum purchase price you are qualified for? (even if you plan on spending less)

\$ \_\_\_\_\_

What forms of financing are you considering? (Circle one)

Fixed Rate

FHA

Cash

Other

Do you have financing available through work, family, or other means? Yes / No  
Please explain.

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

Would you like us to recommend a mortgage representative who will pre-qualify you and go over with you exactly what is needed to get the best rates and terms for a loan? Yes / No

I am already pre-approved with:

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Contact: \_\_\_\_\_

phone: \_\_\_\_\_

email: \_\_\_\_\_

**Thank you for sharing your thoughts.  
We are looking forward to working with you.**

**If you have any questions or concerns, please contact our office.**

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