

Getting to know you... Worksheet

Name _____

Current Address _____

Phone Numbers _____

Fax Numbers _____

E-Mail Addresses _____

Family size _____

Pets _____ Type of Home Business _____

Own Rent Must sell to purchase

Desired possession date _____

Ideal Price _____ Ideal Monthly Payment _____

Prequalified Preapproved With whom _____

Ideal Location _____

Special requirements: day care facilities sports/recreation programs

cultural activities school requirements other

Notes: _____

of Bedrooms _____ Minimum _____

of Bathrooms _____ Minimum _____

Garage _____ Lot Size _____

Age of home _____ Style _____

- | | | |
|---|--------------------------------------|--|
| <input type="checkbox"/> Eat-in Kitchen | <input type="checkbox"/> Fenced yard | <input type="checkbox"/> Deck/Patio |
| <input type="checkbox"/> Separate Dining Room | <input type="checkbox"/> Fireplace | <input type="checkbox"/> Pool |
| <input type="checkbox"/> Family Room | <input type="checkbox"/> Waterfront | <input type="checkbox"/> Additional Vehicles |
| <input type="checkbox"/> Finished Basement | <input type="checkbox"/> Home Office | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

Worksheet

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Describe your ideal home _____

If I wasn't able to find everything in the price range and location you want, what would you consider compromising on? _____

Are there some items that are 'deal breakers' – things you won't compromise on? _____

Tell me a little about your lifestyle, how you entertain _____

Is there anything else I need to know - any other requirements or needs? _____

