



# Home Buyer Questionnaire

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

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

Cell Phone: (\_\_\_\_) \_\_\_\_\_ Home Phone: (\_\_\_\_) \_\_\_\_\_ Email: \_\_\_\_\_

Work Phone 1: (\_\_\_\_) \_\_\_\_\_ Work Phone 2: (\_\_\_\_) \_\_\_\_\_ Preferable contact method: \_\_\_\_\_

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

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

To help you achieve your goals in relation to buying a home I need to ask you some questions that will help me understand how I can serve you best. Tell me, what is the primary reason you are interested in finding a new home?

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

How many children do you have? \_\_\_\_\_

#1 \_\_\_\_\_ Birth Date \_\_\_\_\_ #2 \_\_\_\_\_ Birth Date \_\_\_\_\_

#3 \_\_\_\_\_ Birth Date \_\_\_\_\_ #4 \_\_\_\_\_ Birth Date \_\_\_\_\_

Do you have any special school requirements? \_\_\_\_\_

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

Do you have any pets? Yes  No  Type of pets \_\_\_\_\_

\_\_\_\_\_

Approximately how many square feet are you looking for in a home? \_\_\_\_\_

Number of bedrooms? \_\_\_\_\_ Number of bathrooms? \_\_\_\_\_ Yard Size? \_\_\_\_\_

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

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

\_\_\_\_\_

How much monthly payment including PITI would be reasonable for you? \_\_\_\_\_



**Julia Tse,**  
*Broker Associate*  
DRE # 01412919

Please rate the importance of each feature that you would like in a home.

1 being not important and 5 being very important

Fireplace.....	1	2	3	4	5	Closet Space.....	1	2	3	4	5
Entertainment Area.....	1	2	3	4	5	Modern Kitchen.....	1	2	3	4	5
Family Room .....	1	2	3	4	5	Pool/Spa.....	1	2	3	4	5
Open Feeling.....	1	2	3	4	5	Large Yard .....	1	2	3	4	5
Family Neighborhood.....	1	2	3	4	5	Low Maint. Yard.....	1	2	3	4	5
Single Story.....	1	2	3	4	5	Privacy.....	1	2	3	4	5
Double Story.....	1	2	3	4	5	BBQ Area .....	1	2	3	4	5
Dining Area.....	1	2	3	4	5	View.....	1	2	3	4	5
Close to Schools.....	1	2	3	4	5	Close to Shopping.....	1	2	3	4	5
Close to Work.....	1	2	3	4	5	Location.....	1	2	3	4	5

Is there a special feature I have not mentioned that is important to you? \_\_\_\_\_

What I would like you to do is now describe what you would consider an ideal home for you. Tell me about the floor plan, decor, yard, etc? \_\_\_\_\_

Tell me about your lifestyle. What do you see yourself doing in your new home? (entertaining, relaxing, raising a family, etc.) \_\_\_\_\_

Are there any areas you have in mind that you would like to look at? \_\_\_\_\_

What attracts you to this area(s)? \_\_\_\_\_

What do you feel is the key factor in your purchasing decision? (pricing, location, etc.) \_\_\_\_\_

What time frame do you have in mind for moving? \_\_\_\_\_

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

Do you need to sell another home before moving? Yes  No

Is that home currently listed for sale? Yes  No

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

The agent that you listed with: \_\_\_\_\_ Phone# \_\_\_\_\_

How long has it been on the market? \_\_\_\_\_

My goal is to help making you buying your home positive experience. To do that we need open communication between us, that way the little problems that naturally come up in buying a home can be handled easily and without stress. Is there anything that anything that you would like to tell me that you feel might be helpful in out working together? \_\_\_\_\_

Do you have a person who would prefer me to use as the main contact? Yes  No  Either

If yes, who is the preferred contact? \_\_\_\_\_

When is the best time for me to call you? Sun: Yes  No  Time \_\_\_\_\_

Mon Yes  No  Time \_\_\_\_\_ Thur Yes  No  Time \_\_\_\_\_

Tue Yes  No  Time \_\_\_\_\_ Fri Yes  No  Time \_\_\_\_\_

Wed Yes  No  Time \_\_\_\_\_ Sat Yes  No  Time \_\_\_\_\_

When is the best time for you to look at properties? \_\_\_\_\_

Do you understand how the real estate MLS works? Yes  No

Do you understand how an agent who finds you a home gets paid? Yes  No

After I have shown you a number of homes that are close, but not quite the one you are looking for, and walk into an Open House being held by another agent and say that this is their home, what would you do?

- Ask the agent at the open house to write up an offer
- Call and ask me to write up an offer on the home

Are you willing to commit to working with only me to help you find a home? Yes  No

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

In order to help you obtain the best interest rate and terms, I need to gather some basic financial information. This will allow me to explore all options and to expedite your loan once we have located the right home for you. Providing this information is at your discretion. It will be held in total confidence and will only be used to help secure the most favorable financing terms possible on your behalf.

Employment Information:

Your Occupation: \_\_\_\_\_ Gross Monthly Income: \_\_\_\_\_

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

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

Spouse's Occupation: \_\_\_\_\_ Gross Monthly Income: \_\_\_\_\_

Spouse's Current employer? \_\_\_\_\_ Years: \_\_\_\_\_

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

Do you have other sources of income? Yes  No  Explain: \_\_\_\_\_

How much money do you have available for a down payment? \_\_\_\_\_

Where is the money coming from? \_\_\_\_\_

Do you understand how financing a home works? Yes  No

Closing Costs? Yes  No

Loan Origination fees? Yes  No

Title Insurance? Yes  No

Would you like me to send you some information about any of these items? Yes  No

Please list what you would like information on: \_\_\_\_\_

What forms of financing are you considering in purchasing a home?

Fixed Rate? Yes  No  Variable Rate? Yes  No

F.H.A.? Yes  No  V.A.? Yes  No

Do you have any financing available through work, family, or other means? Yes  No

Please Explain: \_\_\_\_\_

Would you like me to recommend a mortgage representative that could pre-approve you and go over with you exactly what is needed to get the best rates and terms to pre-approve you for a loan? Yes  No

If yes, when would be a good time for a loan representative to call you? \_\_\_\_\_

What bills do you have that are over \$150.00 per month?

Car \_\_\_\_\_ Insurance \_\_\_\_\_

Car \_\_\_\_\_ Investments \_\_\_\_\_

Credit Card \_\_\_\_\_ Child Support \_\_\_\_\_

Credit Card \_\_\_\_\_ Alimony \_\_\_\_\_

Credit Card \_\_\_\_\_ Other \_\_\_\_\_

Other \_\_\_\_\_ Other \_\_\_\_\_

Do you have any other major financial obligations that could have a bearing on the purchase of a home?

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