Perfect Home Qualifying Form

Date: Time: Buyer(s) Name(s)

Current Address (full): # Decision Makers:

Email: Phone:

Best time to call: Best days/times to meet:

Searching For: Type: Style: # Bdrms: # of Bths: Sq. Ft. range: -

Lot Size: Special/Other needs:

L, P, M, A, M, A [Location Price Motivation Has an Agent Mortgage Pre-approval Appointment]

Location preference mostly by:

Details:

Price: range preferred? - Taxes quoted "not to exceed": $ Details:

Motivation: 1 - 10? Time Frame: Details:

Current home: Own? Must sell or desires to sell before buy? Current property on market?

If ON market: If current home NOT on market, contact referral or listing agent to list? ☐ Yes ☐ No

Renting? Lease/Rental Agreement ends: Details:

Agent: Who is your agent for Buying? Selling? Are you a first-time home buyer?

How long searching for a new home? How many homes have you been inside of? Ever put in an offer?

How have you been seeing homes? Details:

Mortgage: Paying Cash: Need a mortgage: Type of loan: Down % to be financed: %

Source of funds: Have % down for contract Liquid?

Pre-approved: When? Lender Contact:

Need a lender? Emailed list to prospect? Details:

Appointment/Call Transfer: Appointment made for: Call Transferred:

Next step for agent/customer:

Client Care Coordinator: Cell #: Buyer Specialist: Cell #:

Who to thank? Outside Referral Fee: