

**Financial Information**

In order to help you obtain the best interest rates & 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 me match you with the lender that I feel can secure you the best financing possible.

Do you understand how financing a home works?  Yes  No Closing Costs?  Yes  No  
Loan Origination Fees?  Yes  No Title Insurance?  Yes  No Professional Home Inspection?  Yes  No  
Would you like me to send you some information about any of these items?  Yes  No

Please Circle the items on which you would like to receive 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 Other  Yes  No

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

Explain. \_\_\_\_\_

Would you like me to recommend a mortgage representative that could prequalify you and review with you exactly what is needed to get the best rates and terms to prequalify for a loan?  Yes  No

When would be a good time for a loan representative to call you? \_\_\_\_\_

**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 many years have you been married? \_\_\_\_\_ Anniversary Date: \_\_\_\_\_

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

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

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

- |                   |                     |
|-------------------|---------------------|
| Car _____         | Insurance _____     |
| Car _____         | Boat _____          |
| Credit Card _____ | 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?  Yes  No \_\_\_\_\_

Once you have completed the Questionnaire please give me a call or send it to me to set your free no obligation

**CELL: 775-298-1599 • EMAIL: Yvette@YourTahoeHome.com**



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*Listening Between The Lines*

**BUYER'S QUESTIONNAIRE**

Last Name (s): \_\_\_\_\_ Home Phone: (\_\_\_\_) \_\_\_\_\_

First Name: \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_

E-mail \_\_\_\_\_@\_\_\_\_\_

First Name: \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_

E-mail \_\_\_\_\_@\_\_\_\_\_

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

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

Twitter User Name: \_\_\_\_\_ Facebook User Name: \_\_\_\_\_

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

\_\_\_\_\_

Would you mind if I contacted you via text?  Yes  No  For short messages only  I always prefer text

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

Names : #1 \_\_\_\_\_ Birthdate \_\_\_\_\_

#2 \_\_\_\_\_ Birthdate \_\_\_\_\_

#3 \_\_\_\_\_ Birthdate \_\_\_\_\_

#4 \_\_\_\_\_ Birthdate \_\_\_\_\_

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

\_\_\_\_\_

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

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

Numberofbedrooms? \_\_\_\_\_ Numberofbathrooms? \_\_\_\_\_

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

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

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





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

Choose the number that best fits your desires:  
1 being not important ... 5 being very important.

- |                                    |                                   |
|------------------------------------|-----------------------------------|
| Fireplace..... 1 2 3 4 5           | Closet space ..... 1 2 3 4 5      |
| Entertainment area ..... 1 2 3 4 5 | Den ..... 1 2 3 4 5               |
| Family room..... 1 2 3 4 5         | Modern kitchen..... 1 2 3 4 5     |
| Carpet color ..... 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 room..... 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 now is 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 geographic areas you have in mind that you would like to look at? \_\_\_\_\_

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

What do you feel will be the key factors in your purchasing decision? (Price, terms, locations, 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? \_\_\_\_\_

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

Agent that you listed with? \_\_\_\_\_ Phone: \_\_\_\_\_

My goal is to help make buying your home a 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 you would like to tell me that you feel might be helpful in our working together?

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

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

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

Mon:  Yes  No Time \_\_\_\_\_ Tues:  Yes  No Time \_\_\_\_\_ Wed:  Yes  No Time \_\_\_\_\_

Thurs:  Yes  No Time \_\_\_\_\_ Fri:  Yes  No Time \_\_\_\_\_ Sat:  Yes  No Time \_\_\_\_\_

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

Do you understand how the real estate MLS service 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 you walk into an open house being held by another agent and say this is the home, what would you do?

Check one:

A: Ask the agent at the open house to write up the offer. or

B: 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: \_\_\_\_\_

I authorize REALTOR® Yvette Shipman to contact me via telephone, fax and e-mail regarding current and future real estate business.

Signature \_\_\_\_\_ Date \_\_\_\_\_