

Buyer Lead Sheet

Date: _____

Lead Source/Property that prompted the call: _____

Contact Information

Name: _____

Email: _____

Street Address: _____

Childrens' Names: _____

Home Phone: _____

Mobile Phone: _____

What is the best way to get in touch with you? _____

What times are best? _____

Buyer Consultation Prequalification Questions

1. Has an agent taken you out and shown you any properties? ☐ YES ☐ NO

If yes, how is it going?

2. Is there anybody else buying the home with you?

3. Who will be living in your home?

4. How long have you been looking for a home?

5. I'm curious, why are you moving?

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6. Are you renting now, or do you own? ☐ RENT ☐ OWN

Renter: Do you know when your lease is up? _____

Owner: Do you need to sell your current home before you buy your next home?

☐ YES ☐ NO

If yes: Have you signed a listing agreement with a real estate agent to sell your home?

☐ YES ☐ NO

If no: When would be a good time for us to get together so I can give you a free market analysis on your home? _____

7. Are you going to be paying cash or will you be getting a mortgage for the purchase of your home? ☐ CASH ☐ MORTGAGE

Mortgage: Have you already been preapproved by a lender? ☐ YES ☐ NO

If yes: Who are you working with? _____

If no: Do you need a lender recommendation? _____

What is the amount you are preapproved for? _____

What will your down payment be? _____

8. What price are you comfortable with? _____

9. Is anyone else involved in your home buying decision? _____

10. On a scale of 1 to 10 with 10 meaning you must buy a home as quickly as possible and 1 meaning you are not sure you'll really buy anything, how would you rate yourself? _____

Anything less than 10: What would it take for you to become a 10?

11. When do you need to be in your new home? _____

12. I'd love to help you buy a home. In order to help you find a perfect home, all we need to do is set an appointment (with all of the decision makers) so I can help you get what you want in the time you want. What is a better time for us to meet? _____ day at _____ time, or _____ day at _____ time?

Appointment Date & Time: _____