

Buyer Needs Assessment Worksheet

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|------------------------------|--|---|
| Name(s) | | |
| Current Address: | | |
| Phone Numbers: | Home: _____ Work: _____ Mobile: _____ | Home: _____ Work: _____ Mobile: _____ |
| Fax Numbers: | | |
| E-Mail: | | |
| Preferred contact method(s): | <input type="checkbox"/> Phone: _____ <input type="checkbox"/> Mobile _____ <input type="checkbox"/> E-mail: _____ | |

Family size: _____ Pets: _____

Currently: Own Rent Must sell to purchase?

Desired possession date _____

Mortgage: Prequalified Pre-approved

Lender: _____

Ideal Price: _____ Ideal Monthly Payment: _____

Ideal Location: _____

of Bedrooms: _____ # of Bathrooms: _____

Minimum: _____ Minimum: _____

Lot size: _____

Garage: _____ How many vehicles? _____

Parking Space: Boat Camper Bus/truck _____

Age of home: _____ Style: _____

- | | | |
|---|--|--|
| <input type="checkbox"/> Eat-in kitchen | <input type="checkbox"/> Finished basement | Special requirements |
| <input type="checkbox"/> Separate dining room | <input type="checkbox"/> Fenced yard | <input type="checkbox"/> Day care facilities |
| <input type="checkbox"/> Family room | <input type="checkbox"/> Deck/patio | <input type="checkbox"/> Elder care |
| <input type="checkbox"/> Fireplace | <input type="checkbox"/> Pool | <input type="checkbox"/> Cultural activities |
| <input type="checkbox"/> Workshop | <input type="checkbox"/> Waterfront | <input type="checkbox"/> School requirements |
| <input type="checkbox"/> Home office | <input type="checkbox"/> | <input type="checkbox"/> Sports/recreation |
| <input type="checkbox"/> Home business | <input type="checkbox"/> | <input type="checkbox"/> Public transportation |

The ideal home: _____

How long have you been looking for a home? _____

How have you been looking? _____

Did you see anything you liked? _____

What kept you from buying it? _____

Have any agents shown you homes? _____

What was your relationship with the agent? _____

What did you sign with the agent? _____

If we cannot find everything in the price range and location you want, what would you consider compromising on? _____

Are some features "deal breakers" that you won't compromise on? _____

Is there anything else I should know about your requirements? _____