
Buyer Needs Analysis



Personal Profile

I will listen to your needs, explain the process, and guide you every step of the way.

Name (1) _____, (2) _____

Address _____ Own/Rent _____ Years in this home _____

Home Phone _____ Work (1) _____ Work (2) _____

E-mail (1) _____

E-mail (2) _____

Preferred Method of Communication: Home Phone Work (1) Work (2) E-mail (1) E-mail (2)

Children (names/ages) _____

Motivation

Reason for move _____

Desired Possession date _____ is this date flexible? _____ Why _____

Moving from _____ Referral Services accepted? _____

Do you need to sell your Present home before closing on your next home? _____

Present home: Listed _____ Sold _____ Est. Equity \$ _____ Closing Date _____

Have you seen any homes you like? _____ Why didn't you buy? _____

Are you looking at homes with any other sales associates? _____

Have you ever bought a home before? _____

Family's feelings about moving? _____

Authority

How does your family make important buying decisions such as this? _____

Anyone else who needs to be consulted prior to you buying a home? _____ Reason _____

Financial Information

Amount available for down payment? \$ _____ Source _____ Who controls _____

Monthly income	Borrower (1)	Co-Borrower (2)	Monthly Expenses	Borrower & Co-Borrower
Total gross income*	_____	_____	Housing	_____
Other income**	_____	_____	Other installment payments	_____
	_____	_____	Revolving account payments	_____
	_____	_____	Other	_____
Total monthly income	_____	_____	Total monthly expenses	_____
Is all income Verifiable	_____	_____		

*Overtime, bonuses and other incentive pay often are not included by lenders for qualification.

** Alimony, child support or separate maintenance need not be revealed if it is not to be considered for repaying the loan.

Regardless of what you may qualify for, how large a payment are you comfortable with? _____ to _____

Have you been involved in any bankruptcy, mortgage foreclosure, or other credit problems during the last seven years?

Please Explain: _____

Eligible for government or special financing programs? _____

Buyer's Estimated Price Range _____ to _____ Loan type, term, rate _____

Housing Information

What do you like about your present home? _____

What would you change about your present home? _____

Do you have any hobbies, interests, lifestyle factors that would affect your housing needs? _____

Do you anticipate any changes that may affect your needs? _____

Basic features desired: BR _____ Bath _____ Style _____ Lot Size _____ Other _____

Wants	Needs	Priorities

Availability to Look at homes

Best times to look at homes: Days _____ Nights _____ Weekends _____

Is there anyone else who could benefit from this type of discussion? _____

Source of buyer lead: _____ Follow-up call made to source? _____

Showing Record

Address		Style	Size	Built	Lot	BR	BA	Gar
Date	Price	Comments						

Address		Style	Size	Built	Lot	BR	BA	Gar
Date	Price	Comments						

Address		Style	Size	Built	Lot	BR	BA	Gar
Date	Price	Comments						

Address		Style	Size	Built	Lot	BR	BA	Gar
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