

# Determining Your Goals

1. Where are you currently living? How long have you lived there? \_\_\_\_\_  
\_\_\_\_\_

2. Do you rent or own your current home? \_\_\_ Rent \_\_\_ Own

a. If you have a lease, when does it expire? \_\_\_\_\_ (i.e. MM/DD/YYYY)

b. Need to sell your current home to purchase another? \_\_\_ Yes \_\_\_ No

3. Have you met with a lender yet? If yes, who? \_\_\_\_\_  
\_\_\_\_\_

4. Did they give you a pre-approval letter? \_\_\_ Yes \_\_\_ No

5. Who will be involved in the loan process and are you relying on additional sources of funds? \_\_\_\_\_  
\_\_\_\_\_

6. What price range have you been considering? low \$ \_\_\_\_\_ to high \$ \_\_\_\_\_

7. How long have you been looking for a home? \_\_\_\_\_

8. Have you seen any home that you like? \_\_\_ Yes \_\_\_ No

9. What is your timeframe for making a move? \_\_\_\_\_

10. Where do you prefer to live? Do you have specific neighborhoods in mind? \_\_\_\_\_  
\_\_\_\_\_

11. Do you have a specific style of property in mind? \_\_\_ Yes \_\_\_ No

12. When are the best days or times for you to view properties? \_\_\_\_\_  
\_\_\_\_\_

# Wants and Needs Analysis

What items do you need in your next home and what items would you like to have?

| Item Description | Wants | Needs |
|------------------|-------|-------|
| Bedrooms         |       |       |
| Baths            |       |       |
| Square Footage   |       |       |
| Extra Room       |       |       |
| Age              |       |       |
| Heat Source      |       |       |
| Style            |       |       |
| Lot Size         |       |       |
| Garage           |       |       |
| Price            |       |       |
| Community        |       |       |
| School District  |       |       |
| Other            |       |       |
| Other            |       |       |
| Other            |       |       |
| Other            |       |       |

# Lifestyle and Community

Please list your desired proximity to the following locations:

| Item Description   | Miles | Minutes |
|--------------------|-------|---------|
| Work/Commute       |       |         |
| Public Transit     |       |         |
| Major Airport      |       |         |
| Major Freeway      |       |         |
| Grocery Store(s)   |       |         |
| School District(s) |       |         |
| Family & Friends   |       |         |
| Shopping Center    |       |         |
| Parks & Recreation |       |         |
| Restaurants        |       |         |
| City Center        |       |         |
| Other              |       |         |
| Other              |       |         |
| Other              |       |         |
| Other              |       |         |

# Home Search Criteria

Name(s) \_\_\_\_\_

## Top Priorities

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## Communities of Interest

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

| Available Down Payment (\$) | Comfortable Monthly Payment Range (\$)       | Price Range (\$)                             |
|-----------------------------|--|--|
| <input type="text"/>        | <input type="text"/> to <input type="text"/> | <input type="text"/> to <input type="text"/> |

No. of Bedrooms

No. of Bathrooms

Interior Sq. Footage  to

Lot Size  to

Moving Time Frame  1-3 months  3-6 months  6 months+

Preferred School District(s) \_\_\_\_\_

Other Criteria \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_