

Buyer Interview

What is your schedule today? How much time do we have together?

If its alright with you, what I would like to do first is ask you some questions so we can get better acquainted. That way I can be more effective at helping you reach your goals. Would it be all right with you if I ask you some questions? Is it OK if I take some notes?

Name: _____

Address: _____

Phone (h): _____ **(w):** _____ **(Other):** _____

Fax: _____ **E-Mail:** _____

1. "Could you tell me a little about yourself?"
2. "Do you have a family? Tell me about them."
3. "I'm interested in hearing about the work you do."
4. "What do you do in your time off? What do you do for fun?"
5. "If you won the lottery tomorrow, what would you do?"
6. "If you could live anywhere, where would that be?"

1. "Do you currently own a home? Are you renting?"
2. "How long have you lived there?"
3. "How many homes have you owned?"
4. "How long have you been looking?"
5. "How many homes have you seen?"
6. "Have you seen any homes that you liked?
If yes, "Why didn't you buy the one you liked?"

If no, "What are you looking for that you haven't found?"
7. "Have you recently bought any real estate in California?"
8. "Will you be financing part of the purchase or will you be paying cash?

If they are financing, "Have you met with a lender and been pre-approved for a loan?"

1. "How soon would you like to be moved?"
2. "Why is that an important time frame for you?"
3. "How would your plans be affected if you moved (earlier or later)?"
4. "What would happen if you didn't find a home by then?"
5. "If we found the right home today, what would you do?"
6. "Is there anything you need to resolve before you purchase a home?"
7. "Will anyone else be involved in the decision to purchase?"
8. "Will anyone be offering financial assistance?"
9. If you already own a home?
 - a) "Are you able to buy another home without selling your present home?"
 - b) "Would you like to buy first or sell first?"
 - c) "What would be a more comfortable extreme: owning 2 homes or owning none?"

1. "Of all the things you're trying to accomplish in this move, what is the most important?"
2. "If you would, bring to mind the home in which you grew up. What were some of your favorite parts of it? Why?"
3. "In your current home, what are the things about it that you like the best? Why?"
4. "What is your favorite room in a home? Why?"
5. "How large of a home did you have in mind? Why?"
6. "What style of home did you have in mind? Why? What do you consider to be the opposite of that style and how would that make you feel?"
7. "Help me visualize how you'd like your next home to look."
 - a. "What are the most important features to you? Why?"
 - b. "What are the 3 things you can't live without? Why?"
 - c. "What is the 1 thing you absolutely would not give up? Why is that? What is it that you like about that? How will that make you feel? How much latitude do you have on that requirement?"

8. "Considering all your family members, what requirements do they have? Why?"

9. "What hobbies and leisure activities do we need to consider?"

10. "Do you have any pets? Are there any special requirements?"

11. "Do you have any school requirements?"

12. "Do you have any special furniture you would like to accommodate?"

13. "How do you feel about doing decorating or repairs on a home?"

14. "How do you feel about buying a brand new home?"

Family _____ Economic _____

Prestige _____ Individualist _____

Amenity _____ Security/Health _____

Other (describe) _____

1. "What price range did you have in mind?"
2. "How did you decide on that amount?"
3. "How much over that amount would you be willing to go if the home was really appealing to you?"
4. "The home you have described would sell for about \$ _____. How does that feel to you?"
5. "What monthly payment are you comfortable with?"
6. "What is the maximum payment you would consider?"
7. "How did you decide on that amount?"
8. "The lender will require 4 items of financial information: Cash, Income, Debt, and Credit. Would you like to go through each of these now?"
 - a) "How much total cash had you planned to invest?"
 - b) "How much of your present home's equity had you planned to invest?"
 - c) "What is your annual combined gross income?"

- d) "What type of long term obligations, such as car payments or loan payments, do you have each month?"

- e) "Is there anything that will show up on a credit report that we should resolve before loan application?"

"The last time you bought a house, could you tell me about the process you went through to find that house?"

1. "How did you start looking?"

2. "What did you do first? What were the steps you went through?"

3. "Did anyone help you make the decisions?"

4. "From the time you started, how long did the whole process take until you found the house?"

5. "Did that process work for you? Is there something that you would do differently if you had to do it over?"

6. "Are you comfortable more or less using that same process to purchase this home?"

