

# Client Information

Today's Date \_\_\_\_\_

**Counselor Realty**

In order to use our time efficiently when we meet please complete this form and email it to [chris@chrisgemlo.com](mailto:chris@chrisgemlo.com) prior to our meeting or bring it with you if you do not have time prior to our meeting. Once I have your home search wants and needs I can tailor the most up to date computerized home search for you and start networking to find your ideal home.

**Client 1 Name** \_\_\_\_\_ **Home** (\_\_\_\_) \_\_\_\_\_

**Address** \_\_\_\_\_ **Work** (\_\_\_\_) \_\_\_\_\_

\_\_\_\_\_ **Cell** (\_\_\_\_) \_\_\_\_\_

**Email** \_\_\_\_\_ **Fax** (\_\_\_\_) \_\_\_\_\_

**Client 2 Name** \_\_\_\_\_ **Home** (\_\_\_\_) \_\_\_\_\_

**Address** \_\_\_\_\_ **Work** (\_\_\_\_) \_\_\_\_\_

\_\_\_\_\_ **Cell** (\_\_\_\_) \_\_\_\_\_

**Email** \_\_\_\_\_ **Fax** (\_\_\_\_) \_\_\_\_\_

Best person to contact \_\_\_\_\_ at what time of day \_\_\_\_\_

What is the best way to contact you?      Email                      Phone                      Text

Other household members (kids, dogs, cats, etc.) \_\_\_\_\_

Where did you get my name? \_\_\_\_\_

Are you or have you worked with other real estate agents?      Yes                      No

Are you ready to start working together today? \_\_\_\_\_

Ideal date to move in \_\_\_\_\_

## **Check if you rent or own a home:**

### **Rent**

Lease Expires \_\_\_\_\_ Current Monthly Rent \_\_\_\_\_

Conditions of breaking lease \_\_\_\_\_

Have you ever owned a home before?      Yes                      No

### **Currently own a home**

Ideal date to put home on market \_\_\_\_\_ Sell first or find home first

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## Financial Considerations

### Employment

Client 1 Employer \_\_\_\_\_ Title \_\_\_\_\_ Years \_\_\_\_\_

Base Pay \_\_\_\_\_ Overtime/Bonus \_\_\_\_\_ Other Income \_\_\_\_\_

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### Monthly debt payments

Car loans monthly \_\_\_\_\_ Balance \_\_\_\_\_

Credit cards monthly \_\_\_\_\_ Balance \_\_\_\_\_

Student loans monthly \_\_\_\_\_ Balance \_\_\_\_\_

Other loans monthly \_\_\_\_\_ Balance \_\_\_\_\_

### Down Payment Source

Cash on hand \_\_\_\_\_

Money you will receive as a gift \_\_\_\_\_

Investment balances in retirement accounts (not for down payment) \_\_\_\_\_

### Lenders you have talked to

Company \_\_\_\_\_

Name \_\_\_\_\_

Phone \_\_\_\_\_ email \_\_\_\_\_

### Payments

Max monthly payment you would like \_\_\_\_\_

Min monthly payment you would like \_\_\_\_\_

Max purchase price you would like \_\_\_\_\_

Min payment you would like \_\_\_\_\_

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## Personal info

### Client 1

Birthdate? \_\_\_\_\_

Schools you attended (high school and college)? \_\_\_\_\_

Where did you grow up? \_\_\_\_\_

States or Countries you have lived in? \_\_\_\_\_

What types of recreation do you do? \_\_\_\_\_

Describe the home you grew up in? \_\_\_\_\_

### Client 2

Birthdate? \_\_\_\_\_

Schools you attended (high school and college)? \_\_\_\_\_

Where did you grow up? \_\_\_\_\_

States or Countries you have lived in? \_\_\_\_\_

What types of recreation do you do? \_\_\_\_\_

## Questions you want answered at our meeting

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## The Need, Want, and Wish List

- A. Home many bedrooms must you have? \_\_\_\_\_
- B. Home many bathrooms must you have? \_\_\_\_\_
- C. Home many garage stalls must you have? \_\_\_\_\_
- D. What style of home? Check all that apply
  - One story
  - One and a half story
  - Two story
  - Split entry
  - Multi-level
  - Condo
  - Town house
- E. List all the cities you are interested in? \_\_\_\_\_  
\_\_\_\_\_
- F. Are there any geographical areas restricting your search? (For example, you want to be west of 35w and north of interstate 94?) \_\_\_\_\_  
\_\_\_\_\_
- G. What school district do you want to include or exclude? \_\_\_\_\_  
\_\_\_\_\_
- H. NEED: These are items that my new property must have! In fact, if it does not have these items, I won't probably buy it!
  - 1. \_\_\_\_\_
  - 2. \_\_\_\_\_
- I. WANT: It would sure be nice to have these items in my new property, but I can live without them.
  - 1. \_\_\_\_\_
  - 2. \_\_\_\_\_

## What Are You Concerned About?

In all purchases, there are levels of anxiety. What bothers you? You see, if I can learn about your concerns up front, I'm in a better position to cure them. Please tell me your concerns.

Concerned	Least Concerned		to		Most
1. Schools	1	2	3	4	5
2. Down payment	1	2	3	4	5
3. Payments	1	2	3	4	5
4. Points/other costs	1	2	3	4	5
5. Closing costs	1	2	3	4	5
6. Neighborhoods	1	2	3	4	5
7. Security/Crime	1	2	3	4	5
8. Neighbors	1	2	3	4	5
9. Utility costs	1	2	3	4	5
10. Floor plan	1	2	3	4	5
11. Garage	1	2	3	4	5
12. Gas/electric company	1	2	3	4	5
13. Yard space	1	2	3	4	5
14. RV parking	1	2	3	4	5
15. Lack of steps	1	2	3	4	5
16. Room for piano	1	2	3	4	5
17. Cleanliness	1	2	3	4	5
18. Construction	1	2	3	4	5
19. Pool	1	2	3	4	5
20. Smart wiring	1	2	3	4	5
21. Closing time	1	2	3	4	5
22. Inspection for condition	1	2	3	4	5
23. Termites	1	2	3	4	5
24. Travel time to work	1	2	3	4	5
25. Storage	1	2	3	4	5
26. Kitchen	1	2	3	4	5
27. Family room	1	2	3	4	5
28. Bathrooms	1	2	3	4	5
29. Square footage	1	2	3	4	5

## What Are You Concerned About?

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30. Close to:					
Police and fire stations	1	2	3	4	5
Schools	1	2	3	4	5
Shopping	1	2	3	4	5
Bus	1	2	3	4	5
Hospital	1	2	3	4	5
Parks	1	2	3	4	5
Day care centers	1	2	3	4	5
Sport centers	1	2	3	4	5
31. Construction quality	1	2	3	4	5
32. Mother-in-law room	1	2	3	4	5
33. High speed internet	1	2	3	4	5
34. Art of Feng Shui	1	2	3	4	5
35. Other: _____	1	2	3	4	5
36. Other: _____	1	2	3	4	5
37. Other: _____	1	2	3	4	5
38. Other: _____	1	2	3	4	5
39. Other: _____	1	2	3	4	5
40. Other: _____	1	2	3	4	5
41. Other: _____	1	2	3	4	5
42. Other: _____	1	2	3	4	5
43. Other: _____	1	2	3	4	5
44. Other: _____	1	2	3	4	5
45. Other: _____	1	2	3	4	5
46. Other: _____	1	2	3	4	5
47. Other: _____	1	2	3	4	5
48. Other: _____	1	2	3	4	5
49. Other: _____	1	2	3	4	5
50. Other: _____	1	2	3	4	5

Recent studies of home buyers have discovered the following thirteen primary reasons for purchasing a new property. Your job is to put them in order of importance to you, 1 being most important and 13 being least important:

\_\_\_COMFORT: a state of ease and satisfaction.

\_\_\_CONVENIENT: saves or simplifies.

\_\_\_ENTERTAINMENT: pleasure or amusement, provide for the needs and wants of guests.

\_\_\_SECURITY: freedom from danger, anxiety, or doubt.

\_\_\_PRESTIGE: success or rank required.

\_\_\_RECREATION: a means of enjoyable relaxation.

\_\_\_VALUE: to make money.

\_\_\_ECONOMY: to save money.

\_\_\_HEALTH: freedom from disease or ailment.

\_\_\_PRIVACY: freedom from intrusion of landlords or others.

\_\_\_AESTHETICS: beauty in nature and surroundings.

\_\_\_SAFETY: safe from risk of injury, danger, or loss.

\_\_\_INVESTMENT: the goal of building an estate.

As your real estate agent, I do many tasks. Below is a list of some of the tasks I perform.

Rate these in order of importance to you, with 1 most important and 10 least important.

- \_\_\_\_\_ Help finding and arrange financing
- \_\_\_\_\_ Help to determine how much home I can afford
- \_\_\_\_\_ Help finding the right home
- \_\_\_\_\_ Help with price negotiations
- \_\_\_\_\_ Help with paperwork
- \_\_\_\_\_ Help negotiating the terms of the sale
- \_\_\_\_\_ Help to determine what comparable homes are selling for
- \_\_\_\_\_ Help finding a home inspector
- \_\_\_\_\_ Help determining problems with homes so I don't buy a lemon
- \_\_\_\_\_ Help arranging the closing?

List anything else you think I should be doing? \_\_\_\_\_

\_\_\_\_\_

List anything you do not need me to do? \_\_\_\_\_

\_\_\_\_\_

What days of the week are best for you to look at homes? \_\_\_\_\_

What time of day works best for you to look at homes? \_\_\_\_\_



Please give me three names of friends you know. I would like to contact and introduce myself. They do not have to be in the market to buy a home or sell a home. I would just like the opportunity to introduce myself so when they are in the market I will be at the top of their mind.

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_