

NAME _____

DATE _____

Thirty-six questions. You are not going to get through all of them in one sitting and you do not need to — work down a section at a time and leave the rest for the next conversation. The answers are worth more than the ticks.

WHY, AND WHAT THEY ARE LOOKING FOR

1. What is your reason for looking for a new property to buy?

2. What kind of property are you looking for?

3. What cities, areas and neighborhoods have you been looking in?

4. Do you know what price range you wish to look in?

5. What is most important to you in the property you are seeking to buy — price, area, amenities, location, lot, view, parking?

REPRESENTATION

6. Is there an agent or agents currently assisting you with your property search?

7. Have you signed any kind of representation agreement?

TIMING

8. What is your timeframe for finding something, and what are the reasons for that timeframe?
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9. Are you timing this around a lease ending, a house sale, a job start date or another milestone such as a wedding or the birth of a child?
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10. Do you have any upcoming travel or events planned that could affect the property search, or your ability to close on time if you go under contract?
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WHAT THEY HAVE DONE BEFORE

11. Have you owned a property or properties before, and do you currently own or are you renting?
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12. If you own, do you have to sell first to buy?
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13. If you currently own or have owned before, what was that experience like?
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14. Are there any parts of those transactions that could have gone smoother?
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MONEY

15. How do you intend to finance the property?

16. If you are getting financing, have you talked with a lender yet or made a loan application?

17. Do you have a lender you are working with, or would you like names of trusted local lenders I have referred other buyers to?

18. If you have a lender, may I have their contact information so we can work together to keep the transaction smooth?

19. Do you know how much you plan to put down, and what you want your monthly payment to be?

20. Are you familiar with the costs involved in purchasing this kind of property?

21. Would you like an estimate of what your closing costs will be?

22. Do you have the funds to pay closing costs, or will you need the seller to provide a concession for some or all of them?

WHO ELSE IS DECIDING

23. Are there any other decision makers who will be involved in the purchase that I should know about?

24. If so, who are they and what will their involvement be?

25. Will they be joining you in person or virtually to view homes, or attending inspections, walkthroughs or closing?

26. Will they be contributing towards the down payment or the purchase price?

27. If yes, do you have a gift letter and proof of funds from them showing the amount?

DEAL BREAKERS AND WORRIES

28. What are some deal breakers for you in this search?

29. On the flip side, what would make you say "this is the one"?

30. What concerns, hesitations or fears do you have about the homebuying process?

31. What are you willing to compromise on, and what is non-negotiable?

HOW WE WILL WORK TOGETHER

32. Who should be receiving the new listing alerts?

33. How do you prefer me to communicate with you during the process?

34. What is your availability to look at property during the week and at weekends?

35. Are there days or times that work better than others?

36. Are you comfortable using an electronic signature platform such as DocuSign for documents related to your purchase?

