

BUYER PRE-QUALIFICATION OVERVIEW+ QUESTIONS

SO YOU HAVE A PROSPECTIVE BUYER...

Handing out buyer questionnaires is a thing of the past - no one likes to fill out a 2-4 page questionnaire just to snail mail it back to you.

Plus, a potential buyer isn't going to just hand over this information to anyone.

Enter the buyer pre-qualification overview that allows you to collect information from a prospective buyer without giving them unnecessary homework.

HERE'S HOW TO USE THIS DOCUMENT:

01

During a normal conversation with a potential buyer, incorporate the following questions naturally as you talk to your prospective buyer.

02

Don't worry if you miss a couple of points. Focus on the questions marked with *, anything else is extra.

03

Fill this questionnaire out during (if via phone) or after (if in person) to ensure you don't forget something important.

04

As you grab additional information from the prospective buyer, feel free to add it to this document.

GET TO KNOW YOUR PERSPECTIVE BUYER

Spend some time getting to know your buyer. Like any relationship, it's important that both parties like and understand each other to ensure a great fit.

01

Have you bought or sold a home in the past? If yes, how long ago and where?

☐ YES _____ ☐ NO

02

Do you need to sell a property before you can purchase another?*

☐ YES _____ ☐ NO

03

Are you currently in a lease? If yes, when does it expire?

☐ YES _____ ☐ NO

04

How soon do you want/need to be in a new home?

05

Are you interested in a new build, resale home, or both?

☐ NEW BUILD ☐ RESALE HOME ☐ BOTH

NOTES

FINANCING + PRICING

Let's ensure your new buyers:

- 1) already prequalified and ready to start looking at properties OR
- 2) get them connected to a lender if they haven't started this process yet.

01

Have you arranged financing yet?

☐ YES _____ ☐ NO

02

Do you need assistance in locating financing?

☐ YES ☐ NO

03

Have you been pre-qualified, pre-approved, or otherwise informed as to what your max purchase amount is? If yes, for what amount?*

☐ YES _____ ☐ NO

04

If yes, will your financial company issue a pre-qualified/pre-approval letter stating this amount?

☐ YES ☐ NO

05

What monthly payment range would you feel comfortable with?

06

Do you think you will need down payment assistance?

☐ YES ☐ NO

IDEAL HOME DETAILS

What are your prospective homebuyer(s) looking for? Let's understand a little bit about what their needs are. You've gotten their finances down, so if you have a pre-approval maximum, you may already understand what they can afford.

01

Is there a specific part of the city/area that you prefer?

02

Do you prefer 1 story or 2 story? Are there any must-haves?

03

How many bedrooms and bathrooms are you looking for?

Bedrooms _____ Bathrooms _____

BUYER CONTACT INFORMATION

Name _____

Phone _____

Address _____

Email _____

NOTES
