

BUYER NEEDS ASSESSMENT WORKSHEET

Name(s) _____

Current
Address: _____

Phone Numbers:	Home:	_____	Home:	_____
	Work:	_____	Work:	_____
	Mobile:	_____	Mobile:	_____

Fax Numbers: _____

E-Mail: _____

Preferred contact method(s)	Phone:	_____
	Mobile	_____
	E-mail:	_____

Family size: _____ Pets: _____

Currently: ☐ Own ☐ Rent ☐ Must sell to purchase?

Desired possession date _____

Mortgage: ☐ Prequalified ☐ Pre-approved

Lender: _____

Ideal Price: _____ Ideal Monthly Payment: _____

Ideal Location: _____

Accredited Buyer's Representative Official Designation Course

of Bedrooms: _____ # of Bathrooms: _____
 Minimum: _____ Minimum: _____
 Lot size: _____

Garage: _____ How many vehicles? _____
 Parking Space: ☐ Boat ☐ Camper ☐ Bus/truck ☐ _____

Age of home: _____ Style: _____

<input type="checkbox"/> Eat-in kitchen	<input type="checkbox"/> Finished basement	Special requirements
<input type="checkbox"/> Separate dining room	<input type="checkbox"/> Fenced yard	
<input type="checkbox"/> Family room	<input type="checkbox"/> Deck/patio	
<input type="checkbox"/> Fireplace	<input type="checkbox"/> Pool	
<input type="checkbox"/> Workshop	<input type="checkbox"/> Waterfront	
<input type="checkbox"/> Home office	<input type="checkbox"/>	
<input type="checkbox"/> Home business	<input type="checkbox"/>	
		<input type="checkbox"/> Day care facilities
		<input type="checkbox"/> Elder care
		<input type="checkbox"/> Cultural activities
		<input type="checkbox"/> School requirements
		<input type="checkbox"/> Sports/recreation
		<input type="checkbox"/> Public transportation

The ideal home:

How long have you been looking for a home? _____
 How have you been looking? _____
 Did you see anything you liked? _____
 What kept you from buying it? _____
 Have any agents shown you homes? _____
 What was your relationship with the agent? _____
 What did you sign with the agent? _____

If we cannot find everything in the price range and location you want, what would you consider compromising on?

Are some features “deal breakers” that you won’t compromise on?

Is there anything else I should know about your requirements?

