

# BUYER CONSULTATION QUESTIONNAIRE

Prepared by Cary Muhammad, Real Estate Consultant

**To complete this questionnaire, you may print and write in answers, then mail or fax to me.**

**We can also complete by phone or in person.**

I'd love to help you buy a home. In order to help you find the best home for you and your family, all we need to do is set an appointment with all of the decision makers, so I can help you get what you want in the time you want it.

**Appointment date and time:** \_\_\_\_\_



  
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**The Buyer Consultation: Getting Started**

**Basic Information**

Buyer Name	Co- Buyer Name
Phone	Phone
Email	Email

Who is the primary contact and what is the best time and way to reach that individual?

What is your price range?

If we found a home today that meets all of your needs and as many of your wants as possible, would you make an offer?

**Pre-Qualification Questions**

1. Has an agent taken you out and shown you any properties?  
\_\_YES \_\_NO If yes, how's that going?

\_\_\_\_\_

2. Is there anybody else buying the home or property with you?  
\_\_YES \_\_NO

3. Who else will be living in your home or property (i.e., parents, relatives, friends, renters)?

\_\_\_\_\_

4. How long have you been looking for a home or property?

\_\_\_\_\_

5. I'm just curious, why are you moving, or why have you decided to purchase another property?

\_\_\_\_\_

6. Are you renting or do you own now?  
\_\_RENT \_\_OWN

*If Renter:* When does your lease expire?

\_\_\_\_\_

*If Owner:* Do you need to sell your current home before you buy your next one?  
\_\_YES \_\_NO

*If yes:* Have you signed a listing agreement with a real estate agent to sell your home  
\_\_YES \_\_NO

*If NO:* When would be a good time for us to get together (or for me to call you), so I can give you a free market analysis on your home?

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7. Are you going to be paying cash or will you be getting a mortgage for the purchase of your home or property?

CASH  MORTGAGE  OTHER

*If Mortgage:* Have you already been pre-approved by a lender?

YES  NO

*If yes:* Who are you working with?

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What is the amount you are pre-approved for?

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What will your down payment be?

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*If you want ME to recommend a lender.* I have three trusted lenders who always provide top quality service. They often help buyers save money either on a monthly basis or on initial costs. Would you like their contact information?

YES  NO

8. What sales price range are you comfortable with? (for example: \$250,000 to \$350,000) \_\_\_\_\_

Is there anyone else who will be involved in your home-buying decision?

YES  NO

9. On a scale of 1 to 10, with 10 meaning you must buy a home as quickly as possible and 1 meaning you are not sure you'll really buy anything, how would you rate yourself? \_\_\_\_\_

*Anything less than 10:* What would it take for you to become a 10? \_\_\_\_\_

10. When do you need to be in your new home or purchase another property? \_\_\_\_\_

## **Your Lifestyle Interview**

### ***Lifestyle***

Who will be living in the home you purchase?

Will anyone else be spending more than an occasional overnight stay (e.g., parents)?

Describe your lifestyle. What do you enjoy doing at home? Do you do a lot of entertaining? How do you spend your time in the evenings and on the weekends?

Does your home need to accommodate any special needs?

Do you have any pets?

Do you have anything special that needs to be accommodated such as athletic equipment, fine art, large furniture, or a large collection?

When people come to your home, what do you want your home to say about you?

Is there anything I should know about your lifestyle that I have not asked?

### ***Location***

Tell me about your ideal location.

What is your maximum commute time and distance?

What is your work address?

Are schools important?

Is there a particular view you are seeking (e.g., skyline, lake, mountains)?

What else is important about your location?

## **Your Home Wish List**

### **General**

Do you have a preference for when the house was built?

Do you want a house in move-in condition or are you willing to do some work on it?

When people come to your home, what do you want your home to say about you?

Do you want to have a swimming pool or hot tub?

Are you looking for any structures such as a greenhouse or shed or gardening area?

### **Structure/Exterior**

What type of home are you looking for (e.g., single-family, condo, town house, etc.)?

Approximately what size house are you looking for (square footage)?

How many stories?

What size lot would you like?

What architectural styles do you prefer?

What type of exterior siding will you consider?

Do you want a porch or deck?

What are you looking for in terms of a garage (e.g., attached, carport, etc.)?

What other exterior features are important to you?

### **House - Interior**

What kind of style do you want the interior of your home to have (e.g., formal, casual, cozy, traditional, contemporary)?

What kind of floor plan do you prefer (e.g., open vs. walls between all living spaces)?

In general, what are your likes and dislikes for the interior of your home?

### **Bedrooms**

How many bedrooms do you need?

How will each of those rooms be used?

What are your preferences for the master bedroom?

### **Bathrooms**

How many bathrooms do you need?

What are your needs for each of the bathrooms?

***Kitchen***

What features must your kitchen have (e.g., breakfast area, types of appliances, etc.)?

What finishes do you want (e.g., countertops, flooring, appliances, etc.)?

What are your likes and dislikes for the kitchen?

***Dining Room***

Would you like the dining room to be part of the kitchen configuration? What about the living room?

What size dining room table do you have?

***Living Room/Family Room***

Describe your likes and dislikes.

Do you want a fireplace?

What size room(s) do you have in mind?

What other rooms do you need or want?

What else should I know about the inside of the house you are looking for?

**The Neighborhood of Your Dreams**

Please consider the following and record any notes or preferences:

Areas you would enjoy

Specific streets you like

School district(s) you prefer

Your work location(s)

Your favorite shops/conveniences

Recreational facilities you enjoy

Any additional items to consider when selecting your target neighborhoods:

***Summary***

What are the top five things your home *needs* to have?

- 1.
- 2.
- 3.
- 4.
- 5.

Beyond those five things, what is something else you really *want* to have?

If you could have something else, what would that be?

If you could have one last thing to make this your dream home, what would that be?

**How Does Someone Win or Lose With You?**

**WIN**

- 1.
- 2.
- 3.
- 4.
- 5.

**LOSE**

- 1.
- 2.
- 3.
- 4.
- 5.

What do you feel you have the right to expect from me as your real estate consultant?

What do you feel I have the right to expect from you as my client?



## **Important Information for an Easier Buying Experience**

Below is thorough information that will help you be a savvy real estate buyer.

- **The Mortgage and Loan Process (Checklist)**
- **Making an Offer**
- **Closing 101**
- **Frequently Asked Questions**
- **Moving Checklist**
- **Buyer 10+ Experience Questionnaire**
- **My 10+ Customer Service Agreement for Buyers**
- **My Expectations - What I Expect From All of My Clients**
- **The Home Buying Process**

## **The Mortgage and Loan Process (Checklist)**

### **Funding Your Home Purchase**

#### **1. Financial pre-qualification or pre-approval**

Application and interview

Buyer provides pertinent documentation, including verification of employment

Credit report is requested

Appraisal scheduled for current home owned, if any

#### **2. Underwriting**

Loan package is submitted to underwriter for approval

#### **3. Loan approval**

Parties are notified of approval

Loan documents are completed and sent to title

#### **4. Title company**

Title exam, insurance and title survey conducted

Borrowers come in for final signatures

#### **5. Funding**

Lender reviews the loan package

Funds are transferred by wire

#### **Why pre-qualify?**

We recommend our buyers get pre-qualified before beginning their home search. Knowing exactly how much you can comfortably spend on a home reduces the potential frustration of looking at homes beyond your means.

## **Making an Offer**

Once you have found the property you want, we will write a purchase agreement. While much of the agreement is standard, there are a few areas that we can negotiate:

### ***The Price***

What you offer on a property depends on a number of factors, including its condition, length of time on the market, buyer activity, and the urgency of the seller. While some buyers want to make a low offer just to see if the seller accepts, this often isn't a smart choice, because the seller may be insulted and decide not to negotiate at all.

### ***The Move-in Date***

If you can be flexible on the possession date, the seller will be more apt to choose your offer over others.

### ***Additional Property (Seller's Personal Property)***

Often, the seller plans on leaving major appliances in the home; however, which items stay or go is often a matter of negotiation.

Typically, you will not be present at the offer presentation - we will present it to the listing agent and/or seller. The seller will then do one of the following:

- ***Accept the offer***
- ***Reject the offer***
- ***Counter the offer with changes***

By far the most common is the counteroffer. In these cases, my experience and negotiating skills become powerful in representing your best interests.

When a counteroffer is presented, you and I will work together to review each specific area of it, making sure that we move forward with your goals in mind and ensuring that we negotiate the best possible price and terms on your behalf.

## **Closing 101**

### **Prepare for It**

Closing day marks the end of your home-buying process and the beginning of your new life! To make sure your closing goes smoothly, you should bring the following:

- A certified check for closing costs and down payment. Make the check payable to yourself; you will then endorse it to the title company at closing
- An insurance binder and paid receipt
- Photo IDs
- Social security numbers
- Addresses for the past 10 years

### **Own It**

Transfer of title moves ownership of the property from the seller to you. The two events that make this happen are:

#### ***Delivery of the buyers funds***

This is the check or wire funds provided by your lender in the amount of the loan.

#### ***Delivery of the deed***

A deed is the document that transfers ownership of real estate. The deed names the seller and buyer, gives a legal description of the property, and contains the notarized signatures of the seller and witnesses.

At the end of closing, the deed will be taken and recorded at the county clerk's office. It will be sent to you after processing.

## **Frequently Asked Questions**

### ***How will you tell me about the newest homes available?***

The Multiple Listing Service Website provides up-to-date information for every home on the market. I constantly check the *New on Market* list so I can be on the lookout for my clients. I will get you this information right away, the way that is most convenient for you; by phone and/or email.

### ***Will you inform me of homes from all real estate companies or only Keller Williams Realty?***

I will keep you informed of all homes. I want to help you find your dream home, which means I need to stay on top of every home that's available on the market.

### ***Can you help me find new construction homes?***

Yes, I can work with most builders and get you the information you need to make a decision. On your first visit with the builder, I will accompany you. By using my services with a new construction home purchase, you will receive the services I offer, as well as those provided by the builder, at no additional cost.

### ***How does for sale by owner (FSBO) work?***

Homeowners trying to sell their home without agent representation are usually doing so in the hopes of saving the commission. If you see a FSBO and want the advantages of my services, let me contact the owner for you and make an appointment. Most times the homeowner will work with an agent, even though their home is not listed, since the agent is introducing a potential buyer to their property.

### ***Can we go back through our property again once an offer is made, but before possession?***

Usually, we can notify the seller and schedule a convenient time to visit the property again. Immediately before the closing, we will schedule a final walk-through and inspection of your new home.

### ***Once my offer is accepted, what should I do?***

Celebrate and focus on moving into your new home! You will want to schedule your move, pack items and notify businesses of your address change. I will provide you with a moving checklist to help you remember all the details. I will also give you a good faith estimate and HUD statement, which will indicate the amount you will need to bring to closing.

**Moving Checklist**

New Telephone Number: \_\_\_\_\_

New Address: \_\_\_\_\_

Before you move, you should contact the following companies and service providers:

***Utilities:***

- \_\_\_ Electric
- \_\_\_ Telephone
- \_\_\_ Water
- \_\_\_ Cable
- \_\_\_ Gas

***Professional Services:***

- \_\_\_ Broker
- \_\_\_ Accountant
- \_\_\_ Doctor
- \_\_\_ Dentist
- \_\_\_ Lawyer

***Government:***

- \_\_\_ Internal Revenue Service
- \_\_\_ Post Office
- \_\_\_ Schools
- \_\_\_ State Licensing
- \_\_\_ Library
- \_\_\_ Veterans Administration

***Clubs:***

- \_\_\_ Health and Fitness
- \_\_\_ Country Club

***Insurance Companies:***

- \_\_\_ Accidental
- \_\_\_ Auto
- \_\_\_ Health
- \_\_\_ Home
- \_\_\_ Life
- \_\_\_ Renters

***Business Accounts:***

- \_\_\_ Banks
- \_\_\_ Cellular Phones
- \_\_\_ Department Stores
- \_\_\_ Finance Companies/Credit Cards

***Subscriptions:***

- \_\_\_ Magazines
- \_\_\_ Newspapers

***Miscellaneous:***

- \_\_\_ Business Associates
- \_\_\_ House of Worship
- \_\_\_ Drugstore
- \_\_\_ Dry Cleaner
- \_\_\_ Hairstylist

**Buyer 10+ Experience Questionnaire**

1. Here's a list of what you can expect from me. I want you to tell me how important each of these items is to you. Let's use a scale of 1-10, with 10 being "extremely important" and 1 being "not necessary."

I will always respect your time and will try to accommodate you. 1 2 3 4 5 6 7 8 9 10

I will respond to your phone call or emails as quickly as possible. 1 2 3 4 5 6 7 8 9 10

I will discuss the benefits and drawbacks of each home in relation to your needs. 1 2 3 4 5 6 7 8 9 10

I will always be honest with you, even when I have information that you may not want to hear. 1 2 3 4 5 6 7 8 9 10

I will search the MLS daily and inform you of all new homes that meet your wants and needs. 1 2 3 4 5 6 7 8 9 10

I will help you compare homes and make a decision. 1 2 3 4 5 6 7 8 9 10

I will keep your information confidential. 1 2 3 4 5 6 7 8 9 10

I will provide you with a CMA on all the homes you're interested in. 1 2 3 4 5 6 7 8 9 10

I will educate you on the contract and all of its terms. 1 2 3 4 5 6 7 8 9 10

I will always negotiate price and terms in your best interest. 1 2 3 4 5 6 7 8 9 10

I will coordinate and supervise the preparation of all closing documents and guide you through the closing process. 1 2 3 4 5 6 7 8 9 10

I will refer you to proven professionals throughout the entire process. 1 2 3 4 5 6 7 8 9 10

2. Now that I've told you how I work, please tell me what else will make this a "10+ experience" for you.

\_\_\_\_\_

Can you describe exactly what I need to do to accomplish that? \_\_\_\_\_

\_\_\_\_\_

Can you tell me what about that is important for you? \_\_\_\_\_

3. If we could add one more thing to make it a 10+, what would that be? \_\_\_\_\_

\_\_\_\_\_

Can you describe exactly what I need to do to accomplish that? \_\_\_\_\_

\_\_\_\_\_

Can you tell me what about that is important for you? \_\_\_\_\_

4. If we could add one more thing to make it a 10++, what would that be for you? \_\_\_\_\_

\_\_\_\_\_

Can you describe exactly what I need to do to accomplish that? \_\_\_\_\_

\_\_\_\_\_

Can you tell me what about that is important for you? \_\_\_\_\_

5. Have you ever worked with a real estate agent or consultant before? ♦ No ♦ Yes Tell me more:

\_\_\_\_\_

What did you like best about what this person did? \_\_\_\_\_

What did you like the least? \_\_\_\_\_

6. How does someone win with you? \_\_\_\_\_

Anything else? \_\_\_\_\_

7. How does someone lose with you? \_\_\_\_\_

Anything else? \_\_\_\_\_



### **My 10+ Customer Service Agreement for Buyers**

1. Provide you with 10+ customer service during the entire buying process.
2. Organize and schedule your home search process.
3. Discuss the benefits and drawbacks of each home in relation to your specific needs.
4. Provide you with ongoing updates on available homes.
5. Help you to compare homes and make a decision.
6. Advise you on the terms and issues of the offer and fill out the purchase order contract.
7. Present your offer and negotiate on your behalf.
8. Coordinate and supervise the preparation of all closing documents and guide you through the closing process.
9. Help you resolve any closing issues.
10. Coordinate move-in and assist with any post-closing issues.

### **My Expectations - What I Expect From All of My Clients**

Be honest in all things.

Be available to look at homes.

Let me know when you're out of town.

If your wants, needs, or financial situation change, let me know.

If you want to see new construction, call me before you go into models, as there is a good chance that I have either worked with the builder/developer before and have toured or sold their homes before.

If you see a FSBO, call me first with the street name and telephone number, as there's a good chance I have already toured the home.

If you see an ad, sign, or information on the Internet, call me so I can provide you with a CMA.

Let me know if you plan to go to open houses so I can help you if you see anything that you like.

Be as loyal to me as I am to you.

Refer me to your friends, family, or colleagues. Give me their names and telephone numbers.