A close up of a logo

Description automatically generated **BUYER INTAKE SHEET**

Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Lead Generator:

Assigned to: Status: **A B C Diamond: Y / N**  Upgrd if needed

Referral Fee? **Y / N** To Whom?: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ %: \_\_\_\_\_\_\_\_\_\_ Phone:

Prospect: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Decision Maker #2:

Address:

City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_\_ Zip:

How do you prefer to be contacted?: **Call** / **Text** / **Email** *Preferred number to text to:*

Home Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Work:

Cell Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Decision Maker #2 Cell:

Email *(What email do you check?)* :

Own? **Y / N** Rent? **Y / N** Lease up: Rent amount: $\_\_\_\_\_\_\_\_\_\_\_\_\_

***If own…***  Is house on market? **Y / N** Have to sell first? **Y / N**

Working with an agent? **Y / N** How long looking?

Motivation level: **1 2 3 4 5**

Best time to look: o **AM** o **Afternoon** o **PM** o **Weekend**

Price range:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ When to move?

Desired areas:

# Bedroom(s)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_# Bath(s)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Garage? **Y / N**

Special requests:

**Initial Consultation**

Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Time:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Agent:

Will you be paying cash, or will you need to obtain financing?

Are you interested in down payment assistance programs? Y / N

Lender? **Y / N** If yes, company:

Contact: Phone:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Approved amount? Type: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If no, may we have a preferred lender call? **Y / N** Referred to:

ACTION: Send Buyer Book? **Y / N** Relo Package? **Y / N** DATE NEEDED:

COMPLETED BY: