



# 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: \_\_\_\_\_ Spouse: \_\_\_\_\_

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

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

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

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

Cell Phone: \_\_\_\_\_ Spouse 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:  **AM**  **Afternoon**  **PM**  **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? \_\_\_\_\_

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: \_\_\_\_\_