A close up of a logo

Description automatically generated **SELLER 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?)* :

Is the property address the same as your mailing address? **Y / N**

If NO,

How long have you owned your home? \_\_\_\_\_\_\_\_\_\_\_\_\_ Why are you selling?

Moving to? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ When do you need to be there?

Need Agent? **Y / N**  Provided contact info for:

# Bedrooms: \_\_\_\_\_\_\_\_\_\_\_\_ # Baths: \_\_\_\_\_\_\_\_\_\_\_\_ Age: \_\_\_\_\_\_\_\_\_\_\_\_ Style:

Subdivision: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Garage? **Y / N** :

Square feet: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Lot size: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Septic: **Y / N** obtained:

Special features:

Updates last few years? **Y / N**  If YES, what?

Rate your house 1-10 \_\_\_\_\_\_\_\_\_\_\_\_\_ What would be an acceptable selling price to you?

What do you owe? (1st) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (2nd) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How did you hear about us?

What are three things you are looking for in a Realtor®?

1) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 2) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 3)

Have you or are you going to talk with any other agents? **Y / N**

When can you come to the office to meet with the team?

**ALTOS: \_\_\_\_\_\_\_\_\_ LISTING LEADS: \_\_\_\_\_\_\_\_\_ KVCORE: \_\_\_\_\_\_\_\_\_ NARRPR: \_\_\_\_\_\_\_\_\_ USDA:**

**Post visit: Phone call \_\_\_\_\_\_\_\_\_\_\_\_ Personal Note \_\_\_\_\_\_\_\_\_\_\_\_ 2 week check up calendared**

**APPT: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ HANDBOOK EMAIL: \_\_\_\_\_\_\_\_ DOCUSIGN: \_\_\_\_\_\_\_\_ RPD/PLQ:**