


KELLER WILLIAMS®
R E A L T Y
PERFECT HOME PROGRAM

BUYER NEEDS ANALYSIS

Thanks for taking the time to complete the Burish & Serena Team Needs Analysis. This is the first step to finding your perfect home as quickly and easily as possible through our exclusive Perfect Home Program. Though this questionnaire is very thorough and may even seem redundant at times, we'll use every piece of the information contained herein to help you find the home that best supports your lifestyle with the greatest ease and enjoyment...and in the shortest time possible!

Your goals, wants, needs, abilities and motivation are our greatest concern. Once we have reviewed your responses, we can then more effectively provide you with a great home-buying experience and be sure not to waste any of your valuable time looking for properties that either don't meet your criteria or don't exist in our marketplace. So while it might look like an overwhelming amount of information, our experience has shown that the time we'll save is measurable in days and weeks, not just minutes and hours.

This Needs Analysis should be completed by all parties who will participate in the decision-making process. It can be completed all in one sitting or over a few sittings, but shouldn't take a lot of time to complete. If you are unsure of how to answer certain questions or don't think they apply to you, simply mark them and we will look at these items together upon final review.

So relax and take your time with this important tool. It will help us provide you with outstanding service and it will make for a much easier, more enjoyable home-buying process for you.

We look forward to helping you find your perfect home!

Sincerely,

Roberta Burish

REALTOR, GRI
941-704-4223

Howard Serena

REALTOR, GRI
941-928-5224



Burish & Serena TEAM

www.USA-FloridaHomes.net


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Name(s): _____ Date: _____

Address: _____

Phone: (h) _____ (w) _____ (c) _____

Fax: _____ Email: _____

Please take a moment to fill out the following worksheet. In doing so, you will help us better understand exactly what you are looking for.

1. Rank, in order, the important factors in your buying decision. Some of the most common factors are listed below, but you may have your own specific primary considerations.

- _____ Price
- _____ Square footage/number of rooms
- _____ The yard/lot/view
- _____ Neighborhood/location
- _____ Maintenance-free yard
- _____ Security/gated community
- _____ Proximity to work
- _____ Schools
- _____ Architectural Style
- _____ Workshop/garage
- _____ Entertaining space
- _____ Kitchen size and design
- _____ Energy consumption
- _____ Home health/Indoor environmental quality
- _____ Other _____


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2. Property type:
- | | |
|--|---|
| <input type="checkbox"/> Home | <input type="checkbox"/> Condo |
| <input type="checkbox"/> Townhouse | <input type="checkbox"/> Paired Home (Duplex, Double) |
| <input type="checkbox"/> Acreage | <input type="checkbox"/> Villa |
| <input type="checkbox"/> Investment Property | <input type="checkbox"/> Multi-Unit |
3. What are your three absolute must haves in your next home?
- I. _____
- II. _____
- III. _____
4. Minimum price \$ _____ Maximum price \$ _____
5. Minimum number of bedrooms? 1 2 3 4+
6. Minimum number of bathrooms? 1 2 3 4+
7. Approximate square footage? _____
8. Garage required? Y / N For how many cars? _____
9. How important is a view? Very Moderate Not Important
10. If yes, of what and from where?
- _____
11. Where will you spend most of your time? _____
12. What are your outdoor needs? (Select all that apply)
- | | |
|---|--|
| <input type="checkbox"/> Patio/deck | <input type="checkbox"/> Garden area |
| <input type="checkbox"/> Automatic sprinkler system | <input type="checkbox"/> Jacuzzi / spa |
| <input type="checkbox"/> Pool | <input type="checkbox"/> Acreage |
13. What are your indoor needs? (Select all that apply)
- | | |
|---|--|
| <input type="checkbox"/> Fireplace | <input type="checkbox"/> Formal Dining |
| <input type="checkbox"/> Vaulted ceilings | <input type="checkbox"/> Walk-in closets |
| <input type="checkbox"/> Formal living room | <input type="checkbox"/> Office/studio/den |
| <input type="checkbox"/> Move-in condition | <input type="checkbox"/> Some maintenance okay |
14. Preferred age of home? _____
15. What neighborhood/area? _____

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Personal Information

1. Tell us a little about yourself:

Single Married Significant Other

2. Do you have any family that will live in the home?

Children Parents / In-laws Other

#Boys _____ Ages _____

#Girls _____ Ages _____

3. What type of work do you do?

4. How far (in minutes or miles) would you be willing to commute to work?

5. What hobbies/sports do you/your family like?

6. In your current home, what are the three things about it that you like the best? Why?

7. What is your favorite room in a home? Why?

8. Why is the size requirement of your home important?

9. What style (architectural/design) of home did you have in mind? Why?

10. Now that you've shared your most important physical requirements in a home, what is the ONE THING you absolutely would not give up? Why?

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Motivation

1. You currently: Own a home Rent
2. How long have you lived there? _____
3. How long have you owned? _____
4. How long have you been looking? _____
5. How many homes have you seen? _____
6. Have you seen any homes you liked?
 - a. **If yes**, why didn't you buy the one you liked?

 - b. **If no**, why not?

7. Will you be financing part of the purchase or will you be paying cash? _____
8. If financing, have you met with a lender and been pre-approved for a loan?
 - a. Yes/No _____ If yes, Name of Lender: _____

Urgency

1. How soon would you like to be moved? _____
2. Why is that an important time frame for you? _____
3. How would your plans be affected if you moved (earlier or later)?

4. What would happen if you didn't find a home by then?

5. If we found the right home today, what would you do?

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6. Is there anything you need to resolve before you purchase a home?

7. Will anyone else be involved in the decision making process? If so, who?

8. If you already own a home?

a. Are you able to buy another home without selling your present home

Yes No

b. Would you like to buy first or sell first? _____

c. What would be a more comfortable extreme:

Owning 2 homes Owning none

Financial Qualifications

1. How did you decide on your price range?

2. Would you be willing to go above your described range if the home is very appealing to you?

3. What monthly payment are you comfortable with?

4. What is the maximum payment you would consider?

5. How did you decide on that amount?

BUYER NEEDS ANALYSIS

The Process

1. What do you expect from your real estate agent? _____

2. If you have any bad experiences with an agent in the past, describe what went wrong and how you would change things for a better outcome. _____

3. How often do you want to hear from me? _____
4. What is your preferred method of communicating in order (1-3)?
 _____ Work phone _____ Home phone _____ Cell phone
 _____ Email _____ Other _____
5. Could you tell me about the process you went through to find your last house? _____

6. How did you start looking? _____
7. What did you do first? What were the steps you went through? _____

8. Did anyone help you make the decisions? _____
9. From the time you started, how long did the whole process take until you found the house?

10. Did that process work for you? Is there something you would do differently if you had to do it over? _____

11. In order to commit 100% of our time and efforts to helping you achieve your goals, all we ask is that you do the same. Do you feel comfortable approving a loyalty agreement?
