

~ HOME BUYER INTERVIEW ~

Please, use this form to introduce yourself to Kay and Joe Casey and The Casey Team. All information provided is considered proprietary and is maintained in the strictest confidence. This is for OUR use only!

Date: _____
Name(s): _____
Address: _____
City: _____ St: _____ Zip: _____
Home Phone: _____
His Work Phone: _____
Her Work Phone: _____
His Cell Phone: _____
Her Cell Phone: _____
Preferred Email Address: _____

1. Are you working with a Realtor® now? _____. If yes, have you signed "Buyer Agency Agreement" with him/her? _____.

2. What is your idea of a great Realtor®? _____

Have you ever bought or sold a home before? _____. Was it with a Realtor®? _____. Will you please take a moment to tell me how you felt about your experience. (I want to make sure *this* experience is exceptional!)

3. Are you are paying cash? _____. If so, I'll need a letter on bank letterhead signed by someone with the authority to state that you have sufficient funds on deposit to make a purchase of \$XXX. Will you please provide this for me **before** we look at homes? _____. If you're going to obtain a mortgage, arranging financing is our most important task **before** we begin! If you have a pre-approval letter from a lender you prefer, I'll need that **before** we look at homes! Will you please fax that to me at 704-409-4814? _____. If you don't already have that letter, may I have our preferred lender contact you for a free pre-qualification now? _____.

4. What method of communication you prefer: Email ____ Telephone ____ Please tell us when and where you prefer to be called, and/or NOT to be called.

5. How soon do you want to be settled into your new home? _____
Why are you buying now? _____
How long do you *THINK* you will be staying in this next home? _____

6. Our home search will take however long it takes, but, if we were lucky enough to find the right home right away, is there anything that would prevent you from buying right away? _____. If so, what? _____
Is there anyone else involved in this decision with you? _____. If so, whom? _____
_____. They will need to accompany us on your home tours!

7. Do you need to sell your current home? _____. If so, may I refer you to a great Realtor® in your area? _____. If you are leasing, when does your lease expire? _____. How much is your rent? _____/month.

8. In detail, please try to describe your current home or apartment to me in your own words.

9. Please describe what you like and dislike **most** about your current home.

Like Most:

Dislike Most:

10. Are you participating in a corporate relocation? _____. If yes, I need to contact your relocation counselor as soon as possible. Please provide the person's name, phone number and email address. _____
_____.

11. Now, in detail, please try to describe your **next** home to me. The more detail you provide, the better!

12. Please describe what will be the **most** and **least** important about your new home.

Most: _____

Least: _____

13. Where is your workplace located now, or going to be located? Your “significant other’s” workplace (if applicable)? What would you consider to be reasonable for a drive-time to work?

14. Please list your **wants** and **needs** for the features listed below: _____

	WANT	NEED
# Bedrooms	_____	_____
# Baths	_____	_____
Parking Facilities	_____	_____
New or Existing Home	_____	_____
Maximum Age of Home	_____	_____
Floorplan or Style	_____	_____
House/Condo/Townhome.....	_____	_____
Lot Size/Acreage.....	_____	_____
Minimum Square Feet	_____	_____
Exterior Construction	_____	_____
Waterfront/Water view	_____	_____
On Golf Course	_____	_____
Golf Course View	_____	_____
Country Club.....	_____	_____

Other..... _____

Other..... _____

Other..... _____

15. Do you have any special needs? (particular house of worship, medical care, special education options, handicap accessible properties, special rooms, office in home, particular neighborhoods, particular schools, etc):

16. Is there a particular area of town that you prefer? (i.e.- Area 5, uptown area, Union County, University area)

17. What is your target price range? \$ _____ to \$ _____

18. If there is anything I have not addressed here that will help me understand your "perfect home", please discuss it here. _____

19. If I do a great job for you, may I use you as a reference in the future? _____

20. Although it is optional, I ask that you list the date of birth for everyone in your household so I can honor you on your birthday each year... **"if it's important to you, it's important to me!"** _____

21. I am closely associated with a carefully selected group of business people that I trust and respect. I can most likely offer you a referral to someone for just about any need you may have. Before you resort to the Yellow Pages, please ask me for a referral!

22. Would you be interested in receiving new listings by email as homes meeting your criteria come on the market? _____

23. I hope you'll visit us on the web at www.teamcasey.com because we have placed many very informative links about Charlotte there for your convenience. From listings to demographics, crime statistics to employment opportunities...you'll find it there! If you see a property that you'd like to know more about, just email me at thecaseys@topproducer.com.

24. If you'd like to help me even more, please tell me a little about you and your family to help me understand what activities you enjoy, what kind of neighborhood appeals to you, what you like to do inside/outside your home in your spare time, what kind of neighbors you like, etc. In other words, anything that I have not already asked you think will help me understand you, your wants and needs! **If you have any photos of your current home (interior and exterior) that you can share with us, that helps us a lot!**

25. Do you have any recommendations on how I can improve this interview form or our procedures in general? _____

~ Here are some of the things we may discuss when we meet ~
(be sure to bring this list with you!)

- ❑ The Casey Team – Who we work with and what they do for you!
- ❑ Mortgage Money – shopping for low rates; mortgage brokers; online lenders; the value of having a relationship with your lender
- ❑ The use of credit after you apply for your loan
- ❑ The Law of Agency and how all real estate agents work (“FSBO’s”, builders, other company listings, etc)
- ❑ Earnest money, or the "binder" check
- ❑ When I find the right house, how much should I offer?
- ❑ The selection process for homes we will see (the 5 tests!)
- ❑ Multiple Offers and Negotiations
- ❑ Buying a new home from a builder? Let’s discuss “Free money”, “free closing costs”, and other gimmicks
- ❑ Legal/Safety Concerns (radon, synthetic stucco, aluminum wiring, Polybutylene piping, lead based paint, etc)
- ❑ Review of Offer to Purchase and Addenda (Inspections, Loan Contingencies, Alternative 2)
- ❑ Home Warranties – What They Can Do For You and Why You Need One
- ❑ Do you need a survey?
- ❑ What if the appraisal comes back below the sales price?
- ❑ Homeowner’s insurance issues (HO-3 policies, HE-7 and HE-21 policies)
- ❑ The advantage of TWO title searches
- ❑ What to do, what NOT to do when we look at homes