

Buyer Counseling Interview Questionnaire

Directions: This questionnaire is perfect for couples who are considering purchasing either their first home or their next home. This is best filled out when both decision makers are present. Take your time and be thoughtful with your answers.

Client's Motivation

1. On a scale of 1-10, with 1 being "just curious" and 10 being "you'd buy today", how would you rate yourself? _____

Tell me more: _____

What would it take for you to become an 8, 9, or 10? _____

2. Have you talked to any other real estate agents or consultants about the purchase of your ideal next home?

No.

Yes. Whom have you talked to? _____

3. Today, if I demonstrate to you that I will do everything within my power to find your ideal home, will you let me be your agent?

Yes.

Maybe. Tell me more.

Client's Lifestyle

1. Tell me more about your **family**.

Names	Ages	One Word That Describes Them	What do you see them doing in your ideal home? (e.g. work, homework, fun, etc.)
Husband:			
Wife:			

--	--	--	--

2. Any **grandchildren** who will be living with you or spending more than an occasional overnight stay with you? Yes. No.

Names	Ages	One Word That Describes Them	What do you see them doing in your ideal home? (e.g. work, homework, fun, etc.)

3. Describe your **lifestyle**. Are you homebodies? Are you active? Do you do a lot of entertaining? Any hobbies? Tell me all!

4. Is there anything else that you would like to tell me about your **lifestyle**? Particularly anything that relates to your home now and in the next 5-10 years? For instance, maybe you're not a gardener, but it's something you plan to do in the next five years.

5. Recap what you have just discovered about their **lifestyle**!

Current Home

1. Tell me about your **current home**. (Allow them to free-flow with their response.)

Approximate size = _____

How long have you been living here? _____

2. Tell me about your current home likes and dislikes.

😊	😞

(continued on next page)

3. Tell me about your **lot**.

😊	😞

4. Let's expand. Tell me about your **neighborhood**.

😊	😞

5. Why do you want to **move out** of your current home?

6. Is there anything else that you would like to tell me about your **current home**?

7. Let's recap what we've learned about your **current home**!

Past Homes

Homes we have lived in the **past** give us clues for what features our next ideal home should have!

1. Tell me about homes you have **lived in the past**. (Allow them to free-flow with their response.)

2. Tell me about likes and dislikes for homes you have lived in the past.

😊	😞

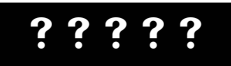
3. Tell me about homes you have **visited in the past** that felt good to you. For instance, maybe your best friend in high school lived in a home that felt good to you, or you've seen a model home that you liked. Tell me about your likes and dislikes.

😊	😞

4. Did the **size** of any of these homes feel right? Tell me more: _____

5. Let's recap what we've discovered about **past homes!**

Ideal Home



Are you ready to talk about your **vision** for your ideal next home? Let's break everything down, item by item.

Location

1. Tell me about your **ideal location**. What part of town do you want to be located in?

2. Tell me about your ideal **commute time and distance**.

Husband = _____ miles from work. Ideal commute time is _____ minutes. Work address is _____

Wife = _____ miles from work. Ideal commute time is _____ minutes. Work address is _____

3. Are **schools** important? Yes. No.

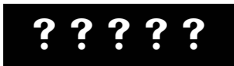
If yes, which district do you prefer? _____

Why? _____

4. Describe your likes and dislikes for **location**.

😊	😞

(continued on next page)



The Neighborhood

5. Tell me about your **ideal neighborhood**.

6. Describe your likes and dislikes.

😊	☹️

The Lot

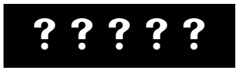
7. Tell me about your **lot**. Approximate size = _____

Features: _____

8. Describe your likes and dislikes.

😊	☹️

(continued on next page)



Exterior

9. Tell me about the **home's exterior**.

Styles you're interested in: _____

Types of **siding** you will consider: _____

Steps: No more than _____ steps. _____

Porch: Yes. No. _____

Other exterior features that are important to you: _____

General Interior (before talking about each room)

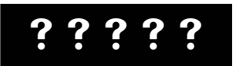
10. Let's talk about the **interior**. Number of stories = _____ Approximate square footage = _____ Flooring = _____

When you come home after work, what do you want your home to do for you? _____

How about on weekends? What should your home do for you? _____

How should your home make you feel when you are in it? _____

(continued on next page)



When others come to your home, what do you want your home to say about you? _____

In general, how should the interior **look**? (e.g. cozy, open, clean, warm, funky, etc.) _____

11. As far as the **general interior** of your next ideal home, describe your likes and dislikes.

😊	😞

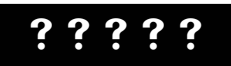
Master Bedroom

12. Tell me about the **master bedroom**. Approximate size = _____
Features: _____

13. Describe your likes and dislikes for your **master bedroom**.

😊	😞

(continued on next page)



Other Bedrooms

14. Tell me about the **other bedrooms**.

If the homes we look at do not have an **office**, do you plan to turn one of the bedrooms into an office? Yes. No.

If the homes we look at do not have a **fitness room**, do you plan to turn one of the bedrooms into a fitness room? Yes. No.

How many of the bedrooms must you have that are devoted only for **guests**? _____

How many bedrooms must you have for your **children or live-in parents**? _____

Based on all of the above, how many **total bedrooms** do you need? _____ + 1 master bedroom = _____ **total bedrooms**

Approximate **size** of bedrooms for children and live-in parents:

Name: _____ 's bedroom = _____

Name: _____ 's bedroom = _____

Name: _____ 's bedroom = _____

Name: _____ 's bedroom = _____

The bedroom we'll convert into an **office** = _____

The bedroom we'll convert into a **fitness room** = _____

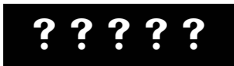
The bedroom we'll convert into a _____ = _____

The bedroom we'll convert into a _____ = _____

15. Describe your likes and dislikes for **bedrooms in general**.

😊	☹️

(continued on next page)



Bathrooms

16. Tell me about the **bathrooms**. Number of bathrooms = _____ (include a master bathroom in this number)

Master bathroom approximate size = _____

Master bathroom features = _____

Must the master bathroom be a part of the master bedroom configuration? Yes. No. If “no”, how close do you want it?

Other bathrooms’ size and features:

Bathroom #1, to be used mainly by _____ Approximate size = _____

Features: _____

Bathroom #2, to be used mainly by _____ Approximate size = _____

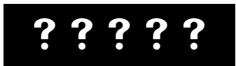
Features: _____

Bathroom #3, to be used mainly by _____ Approximate size = _____

Features: _____

17. Describe your likes and dislikes for **bathrooms in general**.

😊	☹️



Living Room

18. Tell me about the **living room**.

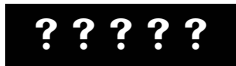
Approximate size = _____

Features = _____

19. Describe your likes and dislikes.

😊	😞

(continued on next page)



Family Room

20. Tell me about the **family room**.

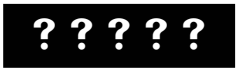
Approximate size = _____

Features = _____

21. Describe your likes and dislikes.

😊	😞

(continued on next page)



Office

22. Tell me about the **office**.

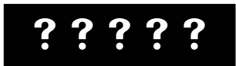
Approximate size = _____

Features = _____

23. Describe your likes and dislikes.

😊	😞

(continued on next page)



Dining Room

24. Tell me about the **dining room**.

Approximate size = _____

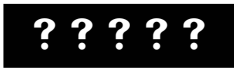
Must the dining room be part of the kitchen configuration, living room configuration, or both? _____

Features = _____

25. Describe your likes and dislikes.

😊	😞

(continued on next page)



Laundry Room

26. Tell me about this room.

Approximate size = _____

Features = _____

27. Describe your likes and dislikes.

😊	😞

(continued on next page)



Another Type of Room:

28. Tell me about this room.

Approximate size = _____

Features = _____

29. Describe your likes and dislikes.

(continued on next page)



Another Type of Room:

30. Tell me about this room.

Approximate size = _____

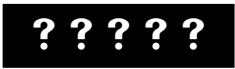
Features = _____

31. Describe your likes and dislikes.

(continued on next page)

Garage



32. Tell me about this structure.

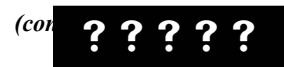
Approximate size = _____

Must the garage be attached, built-in, or a separate structure? _____

Features = _____

33. Describe your likes and dislikes.

😊	😞



Other Structures (pool, shed, greenhouse, etc.):

34. Tell me about this.

Approximate size = _____

Features = _____

35. Describe your likes and dislikes.

😊	😞

(cont) **?????**

Ideal Home (continued)



Other Structures (e.g. pool, shed, greenhouse, etc.):

36. Tell me about this.

Approximate size = _____

Features = _____

37. Describe your likes and dislikes.

(continued on next page)

38. Let's **summarize and prioritize** what we've discovered about your ideal home!

Must be located in:	
Neighborhood must be:	
Home Items	What are the absolutely, do or die, must-have features or attributes in your ideal home?
The Lot <i>Size =</i>	
Exterior	
General Interior <i>Floors =</i>	
Master Bedroom	
Other Bedrooms <i>Number =</i>	
Bathrooms <i>Number =</i>	
Living Room	
Family Room	
Office	
Kitchen	
Dining Room	
Laundry Room	
Another Room:	
Another Room:	
Garage	
Other Structure:	
Other Structure:	

Finances

Do you mind if I ask you some financial questions?

39. Are you currently renting?

Yes. Monthly rent = \$_____. Lease expires on _____.

No. Do you need to sell your current home in order to buy your next ideal home? Yes. No.

What is your current mortgage balance? \$_____ Your monthly payments? \$_____

What do you think your current home will sell for? \$_____

40. Will you be paying cash or financing your home? _____

41. How much in available funds do you have for the purchase of your next ideal home? \$_____

Does this include closing costs? Yes. No.

42. Have you met with a lender yet?

Yes. Who? _____

No. Would you like me to recommend someone? Yes. No.

43. How much of a monthly payment are you comfortable with? Your monthly payment includes the mortgage, taxes, and insurance.

Comfort range is \$_____ to \$_____ per month.

44. What is your price range for your next ideal home?

Price range of \$_____ to \$_____.

45. What is your current gross income? \$_____

Do you expect this to go up, down, or stay the same in the next five years? Up. Down. Stay the same.

46. Where do you work?

Husband: _____ How long? _____

Wife: _____ How long? _____

47. Have either of you ever declared bankruptcy?

No.

Yes. Who: _____ How long ago? _____ years.

48. Have you ever had a home go to foreclosure?

No.

Yes. How long ago? _____ years.

(continued on next page)

Finances (continued)

49. Tell me about your monthly payments on debt.

- First credit card at \$ _____ per month.
- Second credit card at \$ _____ per month.
- Third credit card at \$ _____ per month.
- Fourth credit card at \$ _____ per month.
- One car at \$ _____ per month.
- Another car at \$ _____ per month.
- \$ _____ per month for _____.
- \$ _____ per month for _____.
- \$ _____ per month for _____.
- \$ _____ per month for _____.

50. Are you current on all of your debt?

- Yes.
- No. What's not current and for how much? _____

51. Do you have any credit problems that might show up on a credit report?

- No.
- Yes. What might show up? _____

52. Is there anything else you'd like to tell me about your finances? _____

53. Does anyone have to approve the purchase of your home?

- No.
- Yes. Who? _____

54. Do you have any questions regarding the finances and your next ideal home?

55. Let's recap what you've shared with me regarding **finances**.

Expectations

Your Expectations for Your Home

1. Let's talk about your home and your expectations. What one thing must your home have for it to be a 10? _____

Can you describe exactly what that looks like? _____

Why is this important to you? _____

2. If we could add one more thing to make it a 10+, what would that be? _____

Can you describe exactly what that looks like? _____

Why is this important to you? _____

3. If we could add one more thing to make it a 10++, what would that be? _____

Can you describe exactly what that looks like? _____

Why is this important to you? _____

(continued on next page)

Expectations (continued)

Your Expectations for the Purchasing Transaction

4. Let's talk about the purchasing transaction. What one thing must your home have for it to be a 10? _____

Can you describe exactly what that looks like? _____

Why is this important to you? _____

5. If we could add one more thing to make it a 10+, what would that be? _____

Can you describe exactly what that looks like? _____

Why is this important to you? _____

6. If we could add one more thing to make it a 10++, what would that be? _____

Can you describe exactly what that looks like? _____

Why is this important to you? _____

7. When do you expect to make an offer on your ideal next home? _____

8. When do you expect to be spending your first night in your ideal next home? _____

Your Expectations for Our Win-Win Working Relationship

9. Have you ever worked with a real estate agent or consultant before?

No.

Yes. Tell me more: _____

What did you like best about what this person did? _____

What didn't you like? _____

10. How does someone win with you? _____

Anything else? _____

11. How does someone lose with you? _____

Anything else? _____

(continued on next page)

Expectations (continued)

12. Here's a list of what you can expect from me. I want you to tell me how important each of these items is to you. Let's use a scale of 1-10, with 10 being "extremely important" and 1 being "not necessary". Are you ready?

What YOU Can Expect of Me	How important is this to you?
I will always respect your time and will try to accommodate you.	1 2 3 4 5 6 7 8 9 10
I will respond to your phone call or emails within 24 hours.	1 2 3 4 5 6 7 8 9 10
When I leave town, I will ensure that one of my colleagues follows up with you and is available to help you.	1 2 3 4 5 6 7 8 9 10
I will always be honest with you, even when I have information that you may not want to hear.	1 2 3 4 5 6 7 8 9 10
I will search the MLS daily and inform you of all new homes that meet your wants and needs.	1 2 3 4 5 6 7 8 9 10
I will contact you once per week to update you, even when I have nothing to report.	1 2 3 4 5 6 7 8 9 10
I will keep your information confidential.	1 2 3 4 5 6 7 8 9 10
I will provide you with a CMA on all the homes you're interested in.	1 2 3 4 5 6 7 8 9 10
I will present all offers promptly.	1 2 3 4 5 6 7 8 9 10
I will educate you on the contract and all of its terms.	1 2 3 4 5 6 7 8 9 10
I will always negotiate price and terms in your best interest.	1 2 3 4 5 6 7 8 9 10
I will keep you informed after contract ratification of your loan process.	1 2 3 4 5 6 7 8 9 10
I will refer you to proven professionals throughout the entire process.	1 2 3 4 5 6 7 8 9 10
	1 2 3 4 5 6 7 8 9 10
	1 2 3 4 5 6 7 8 9 10
	1 2 3 4 5 6 7 8 9 10

13. Is there anything else you expect from me? _____

14. To best represent you and to ensure that we have win-win relationship, I expect the following from all of my clients:

What I Expect from ALL of My Clients	Does this sound reasonable?
Be honest in all things.	<input type="checkbox"/> Yes. <input type="checkbox"/> No.
Be available to look at homes.	<input type="checkbox"/> Yes. <input type="checkbox"/> No.
Let me know when you're out of town.	<input type="checkbox"/> Yes. <input type="checkbox"/> No.
If your wants, needs, or financial situation change, let me know.	<input type="checkbox"/> Yes. <input type="checkbox"/> No.
If you want to see new construction, call me before you go into models, as there is a good chance that I have either worked with the builder/developer before and have toured or sold their homes before.	<input type="checkbox"/> Yes. <input type="checkbox"/> No.
If you see a FSBO, call me first with the street name and telephone number, as there's a good chance I have already toured the home.	<input type="checkbox"/> Yes. <input type="checkbox"/> No.
If you see an ad, sign, or information on the Internet, call me first so I can provide you with a CMA.	<input type="checkbox"/> Yes. <input type="checkbox"/> No.
Do not go to any open houses without discussing it with me, as I am usually familiar with either the agent or company sponsoring the open house.	<input type="checkbox"/> Yes. <input type="checkbox"/> No.
Be as loyal to me as I am to you.	<input type="checkbox"/> Yes. <input type="checkbox"/> No.
Refer me to your friends, family, or colleagues. Give me their names and telephone numbers.	<input type="checkbox"/> Yes. <input type="checkbox"/> No.
	<input type="checkbox"/> Yes. <input type="checkbox"/> No.
	<input type="checkbox"/> Yes. <input type="checkbox"/> No.