

Getting Started



Basic Information

Name _____

Phone _____

Email _____

Name _____

Phone _____

Email _____

Who is the primary contact and what is the best time and way to reach that individual?

What is prompting your move?

When do you need to be in your new home?

Are you pre-approved for a mortgage?

What is your price range?

If we found a home today that meets all of your needs and as many of your wants as possible, would you make an offer?

True Visions Team
www.truevisionsteam.com
offers@truevisionsteam.com
www.patsheppardsellshomes.com
678-252-1999



Your Lifestyle Interview

Lifestyle:

Who will be living in the home you purchase?

Will anyone else be spending more than an occasional overnight stay (e.g., parents)?

Describe your lifestyle. What do you enjoy doing at home? Do you do a lot of entertaining? How do you spend your time in the evenings and on the weekends?

Does your home need to accommodate any special needs?

Do you have any pets?

Do you have anything special that needs to be accommodated such as athletic equipment, fine art, large furniture or a large collection?

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

Is there anything I should know about your lifestyle that I have not asked?

Location:

Tell me about your ideal location.

What is your maximum commute time and distance?

What is your work address?

Are schools important?

Is there a particular view you are seeking (e.g., skyline, lake, mountains)?

What else is important about your location?

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Your Home Wish List



General:

Do you have a preference for when the house was built?

Do you want a house in move-in condition or are you willing to do some work on it?

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

Do you want to have a swimming pool or hot tub?

Are you looking for any structures such as a greenhouse or shed?

Structure/Exterior:

What type of home are you looking for (e.g., single-family, condo, town house, etc.)?

Approximately what size house are you looking for (square footage)

How many stories?

What size lot would you like?

What architectural styles do you prefer?

What type of exterior siding will you consider?

Do you want a porch or deck?

What are you looking for in terms of a garage (e.g., attached, carport, etc.)?

What other exterior features are important to you?

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m 678-252-1999



Your Home Wish List

House - Interior:

What kind of style do you want the interior of your home to have (e.g., formal, casual, cozy, traditional, contemporary)?

What kind of floor plan do you prefer (e.g., open vs. walls between all living spaces)?

In general, what are your likes and dislikes for the interior of your home?

Bedrooms:

How many bedrooms do you need?

How will each of those rooms be used?

What are your preferences for the master bedroom?

Bathrooms:

How many bathrooms do you need?

What are your needs for each of the bathrooms?

Kitchen:

What features must your kitchen have (e.g., breakfast area, types of appliances, etc.)?

What finishes do you want (e.g., countertops, flooring, appliances, etc.)?

What are your likes and dislikes for the kitchen?

Dining Room:

Would you like the dining room to be part of the kitchen configuration? What about the living room?

What size dining room table do you have?

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Your Home Wish List

Living Room/Family Room:

Describe your likes and dislikes.

Do you want a fireplace?

What size room(s) do you have in mind?

What other rooms do you need or want?

What else should I know about the inside of the house you are looking for?

Summary:

What are the top five things your home needs to have?

Beyond those five things, what is something else you really want to have?

If you could have something else, what would that be?

If you could have one last thing to make this your dream home, what would that be?

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The Neighborhood of Your Dreams



Please consider the following and record any notes or preferences:

Areas you would enjoy

Specific streets you like

School district(s) you prefer

Your work location(s)

Your favorite shops/conveniences

Recreational facilities you enjoy

Any additional items to consider when selecting your target neighborhoods

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Choo\$ing The Right Realtor Doe\$ Make A Difference