

Buyer Lead Sheet

Date: _____

Lead Source/Property that prompted call: _____

CONTACT INFO	
Name _____	
Email _____	
Street Address _____	Children's Names _____
_____	_____
Home Phone _____	Cell Phone _____
Work Phone _____	Fax _____
What is the best way to get in touch with you?	What times are best?

Buyer Consultation Prequalification Questions

- Has an agent taken you out and shown you any properties? ☐ YES ☐ NO If yes, how's that going? _____
- Is there anybody else buying the home with you? _____
- Who will be living in your home? _____
- How long have you been looking for a home? _____
- I'm just curious, why are you moving? _____
- Are you renting or do you own now? ☐ RENT ☐ OWN
 Renter: Do you know when your lease is up? _____
 Owner: Do you need to sell your current home before you buy your next one? ☐ YES ☐ NO
 If yes: Have you signed a listing agreement with a real estate agent to sell your home?
☐ YES ☐ NO
 If no: When would be a good time for us to get together so I can give you a free market analysis on your home? _____
- Are you going to be paying cash or will you be getting a mortgage for the purchase of your home?
☐ CASH ☐ MORTGAGE
 Mortgage: Have you already been preapproved by a lender? _____
 If yes: Who are you working with? _____
 What is the amount you are preapproved for? _____
 What will your down payment be? _____
 If you want to recommend a lender, I have three trusted lenders who always provide top quality service. They often help buyers save money either on a monthly basis or on initial costs. Would you like their contact information? _____

8. What price range are you comfortable with? _____ Is there anyone else who will be involved in your home-buying decision? _____
9. On a scale of 1 to 10, with 10 meaning you must buy a home as quickly as possible and 1 meaning you are not sure you'll really buy anything, how would you rate yourself? _____
Anything less than 10: What would it take for you to become a 10? _____
10. When do you need to be in your new home? _____
11. I'd love to help you buy a home. In order to help you find a perfect home, all we need to do is set an appointment (with all of the decision makers), so I can help you get what you want in the time you want. What is a better time for us to meet? (day) _____ at (time) _____,
or (alternate day) _____ at (alternate time) _____?

Appointment date and time: _____

Other Information

Information to Remain Confidential

Behavioral Style: D I S C