

DATE ACQUIRED:

110

Whats IMPORTANT to YOU? What do you look for when purchasing a home? Price, feel, lifestyle?

- 1.
- 2.
- 3.

I like to use a weighted scoring system for decision making. I.e. out of 50 total rate the following to help us narrow your search.

1. Location /10 _____
2. Rooms /10 _____
3. Views /5 _____
4. Finishings /5 _____
5. Yard/ lifestyle /10 _____
6. Investment potential / 10 _____

TOTAL _____

Any comments/ special requests?

Prospect's Name:	
Address:	
Phone:	
Email:	
Work Address:	

FAMILY

- How will your family determine the next home?
- What's most important to you/ your family?
- Any Pets?

OCCUPATION

Tell me about your jobs: Where / commute _ What do you do?

RECREATION

DREAMS

If you were to move....

TIMELINE /PLAN - buy or sell first?

-Do you have a timeline?

- what's your experience been with...

-what do you look for ...

-what have you found...

-what do you want vs what you have?

-What can I do to make this transition as easy as possible?

-Any idea of price?

-Any other realtors through? Any special offers they've presented?

1. What is your ideal location for purchase?

2. Have you been pre-approved by your bank/ a broker? What do you have for a down payment? Are you familiar with CMHC fees?

3. Will this be your first home purchase? If not, Would you like to buy or sell first?

4. Is your deposit/ down payment money relatively liquid? i.e. is it in Cash, an RRSP, or TFSA/ bonds ect? The reason I ask this is you will need some money available for a deposit which is placed with your offer.

5. Are you using RRSP funds as your down payment?

5. Have you looked online at some homes? Is there a list of properties you have that are of interest?

6. When would you like to move by

7. Do you have RRSP's? Will you be using these funds for the purchase of your new home

What is the cost ?

<p>Why Are You Thinking of moving? investment. family. Ect?</p> <p>How long have you been at your current address? Where do you live now?</p> <p>When Do you plan on selling your home?</p> <p>Do you need to sell first? Or would you buy then sell?</p> <p>Buying or Selling or Both?</p> <p>Who else will be involved in the transaction, decision-making?</p> <p>Have You Been Pre-Approved?</p> <p>1. FYI - 20% down required for purchases 1m +</p> <p>2. FYI -Under 1M- first 500K can be approved at 5% min downpayment, anything over requires 10% Have a broker?</p> <p>Total monthly housing budget</p> <p>What kind of down payment are you putting?</p> <p>What is your household income??</p>	<p>Are you familiar with Real Estate Prices in the neighbourhood?</p> <p>How much do you owe on the property?</p>
<p>Are you aware of how the CMHC structures their fees, based on the down payment amount?</p>	<p>First time home buyer? Programs: RRSP (90 day), Rebate</p>
<p>NEXT HOME.....</p> <p>PRICE RANGE _____</p> <p>CRITERIA - Area? _____</p>	<p>Amenities _____</p> <p>Pool_____</p> <p>GArage_____</p> <p>Parking _____</p> <p>Schools_____</p> <p>Yard_____</p>

Bedrooms____ washrooms____ Square Feet____ Finishings New Needs work Doesn't matter	Lifestyle (trails, marinas ect) Rental Suite/ option_____ Other_____ Any absolute must haves?_____
Are you aware of the Closing costs for your purchase? - Lawyer fee (approx 1000 + disbursements - taxes ect + title insurance 1500 - 1600) - Land transfer	
Are you aware of any capital gains/ business income that may arise from the sale?	

When is the best time when everyone can go see some homes?

Thinking of new builds? Builders are prone to negotiate more off when you have representation as they realize that we have more clients we would refer to them if we were able to negotiate a good deal, also they will not negotiate money off but they will add more to the inclusions

Cost for

10,000 = \$38 - \$47/ month

100,000 = \$400 - \$490/ month

(depends on insured or not, and other variables)

For qualifying: 20k income = 100K
borrowing

HomeWork

For us:

- a) Send you listings that match your criteria
- b) Come up with our top picks
- c) Send them listings that match their criteria that have sold in the last 30 days

For you:

- a) Prepare docs for lender
- b) Go through listings we have sent
- c) Buyers letter include lender time we've been looking, marital situation, growing a family.
- d) Have an idea of the numbers by playing with the calculators

AFTER APPT follow up checklist.

SEND INTRO EMAIL ____

SEND MORTGAGE EMAIL ____

Setup on Buyer plan ____

Send buyers book ____

Setup on Seller plan ____

Setup on prospect On regional ____ Treb ____

Setup on agent locator matches ____

First buyer email sent - Copied from Drive ____

Doorknocked 200 homes/ dropped letters ____

Send 3 ideal properties ____ Try to book showings

Buyer Representation signed ____

Follow up gift ____

Referral Thank you letter + gift ____