**BUYER CONSULTATION**

Communication is key in any real estate transaction. The more I know about you, your ideas and your expectations, the better I will be able to help you out. This consultation covers the main aspects of the buying process and will allow us to learn from one another by sharing our experiences and concerns freely. Required fields will have a \*, the rest are optional.

**ALL ABOUT YOU**

**-YOUR NAME\***

First: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Last: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**-YOUR PARTNER’S NAME**

First: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Last: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**-YOUR EMAIL\***

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**-YOUR PARTNER’S EMAIL**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**-YOUR CELL PHONE#\***

**-YOUR PARTNER’S PHONE#**

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**-WHERE DO YOU WORK?**

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**-HOW DID YOU HEAR ABOUT ME?**

Example: referred by your REALTOR®, repeat client, etc.

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**-YOUR BIRTHDAY dd/mm/yyyy** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**-YOUR PARTNER’S BIRTHDAY dd/mm/yyyy \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**-YOUR STORY**

Tell me about your situation and why you are purchasing at this time.

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**-WHAT ARE YOUR HOBBIES AND INTERESTS?**

I like yoga, bike riding and gardening. What do you do for fun?

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**-DO YOU HAVE A WEBSITE?**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**-SOCIAL MEDIA USERNAMES?**

**TWITTER**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**INSTAGRAM**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**FACEBOOK**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**BUYER CONSULTATION**

**PROPERTY INFORMATION**

All about the type of investment you’d like to make

-**WHICH PROPERTY STYLES INTEREST YOU?**

Check all that apply:

\_\_ Detached house

\_\_ Townhouse/Half Duplex

\_\_ Apartment style condo

\_\_ Vacant Lot

\_\_ Multifamily Investment Property

\_\_ Investment Property

**-HOW MANY BEDROOMS WOULD YOU LIKE TO HAVE?**

\_\_ None required (vacant land or loft)

\_\_ 1

\_\_ 2

\_\_ 3

\_\_ 4 or more

**-WHAT SIZE PROPERTY WOULD YOU LIKE?**

For example: minimum 1000 square feet

**-WHO ELSE WILL BE LIVING WITH YOU?**

Children, in-laws, tenants, pets, etc.

**-WHAT FEATURES WILL YOUR IDEAL PROPERTY HAVE?**

For example: accessibility, view, etc.

**-WHAT ARE YOUR PROPERTY TURN-OFFS?**

For example: needs lots of renovations, on a busy street, low walking score, etc.

**-WHAT IS YOUR COMFORT LEVEL WITH RENOVATIONS?**

For example: contractor, amateur, “I couldn’t hammer a nail if my life depended on it”, etc.

**-WHICH NEIGHBORHOODS INTEREST YOU?**

\_\_ BE: Beaverdell/Carmi \_\_ BL: Black Mountain \_\_ BW: Big White

\_\_ CRFD: Crawford Estates \_\_ CVWB: Christian Valley \_\_ DM: Dilworth Mountain

\_\_ EL: Ellison \_\_ FI: Fintry \_\_ GA: Glenrosa

\_\_ GL: Glenmore \_\_ JR: Joe Rich \_\_ KN: Kelowna North

\_\_ KS: Kelowna South \_\_ KTVY: Kettle Valley \_\_ LCNW: Lake Country Northwest

\_\_ LCSW: Lake Country SW \_\_ LE: Lake Country East/Oyama

\_\_ LH: Lakeview Heights \_\_ LM: Lower Mission \_\_ MCKY: McKinley Landing

\_\_ NG: North Glenmore \_\_ PE: Peachland \_\_ RN: Rutland North

\_\_ RS: Rutland South \_\_ SE: SE Kelowna \_\_ SFS: Springfield/Spall

\_\_ SHLK: Shannon Lake \_\_ SMCR: Smith Creek \_\_ UD: University District

\_\_ UM: Upper Mission \_\_ WEC: Westbank Centre \_\_ WKE: West Kelowna Estates

\_\_ WLD: Wilden \_\_ WSR: Westside Road

**-DO YOU NEED HELP FINDING NEARBY SCHOOLS OR CHURCHES?**

If so, please indicate grades and public or separate preference and denomination if applicable.

**-WHAT ARE YOUR EXPECTATIONS OF ME AS YOUR REALTOR®?**

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**FINANCIAL INFORMATION**

**-AT WHAT STAGE IS YOUR PRE-APPROVAL?**

\_\_ Haven’t started yet.

\_\_ Working on paperwork.

\_\_ I have a commitment letter.

\_\_ Cash purchase. No mortgage required

**-WHAT IS YOUR PRICE RANGE?**

If you found the perfect place, what would you be willing (and approved) to pay?

**-WHICH LENDER ARE YOU WORKING WITH?**

Name of bank or broker.

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**-WHEN IS YOUR IDEAL POSSESSION DATE?**

For example: 1 month, 3 months, or a specific transfer date.

**-HOW FAMILIAR ARE YOU WITH THE BUYING PROCESS?**

\_\_ I have no clue!

\_\_ I have a rough idea.

\_\_ I’m pretty sure I know how it works.

\_\_ I’m very familiar with it.

**-DO YOU NEED TO SELL A PROPERTY PRIOR TO MAKING THIS PURCHASE?**

If yes, please include address.

**-ARE YOU RENTING NOW?**

If yes, when is your lease up?

**-IS THERE ANYTHING ELSE YOU’D LIKE ME TO KNOW ABOUT?**

**PREFERENCES AND PRIORITIES**

How important are each of the following items to you?

**1=very important 2=important 3=somewhat important 4=it doesn’t matter**

**-HOW IMPORTANT IS IT FOR YOU TO BE CLOSE TO WORK?**

\_\_ 1 \_\_ 2 \_\_ 3 \_\_ 4

**-SIZE OF PROPERTY**

\_\_ 1 \_\_ 2 \_\_ 3 \_\_ 4

**-THE RIGHT PRICE**

\_\_ 1 \_\_ 2 \_\_ 3 \_\_ 4

**-LOCATION**

\_\_ 1 \_\_ 2 \_\_ 3 \_\_ 4

**-TAKING POSSESSION BY A CERTAIN DATE**

\_\_ 1 \_\_ 2 \_\_ 3 \_\_ 4

**-CASH FLOW (FOR RENTAL PROPERTIES)**

\_\_ 1 \_\_ 2 \_\_ 3 \_\_ 4

