

# NEEDS ASSESSMENT

**Answering these questions will help me  
determine your specific needs**

Buyer's Name(s): \_\_\_\_\_

Buyer's Address: \_\_\_\_\_

Phone Numbers: (W): \_\_\_\_\_ (H): \_\_\_\_\_ (C): \_\_\_\_\_

Have you used the services of a REALTOR before? \_\_\_\_\_

What was your experience? \_\_\_\_\_  
\_\_\_\_\_

Why are you moving? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What is your timeframe? \_\_\_\_\_

Do you currently own or are you renting? \_\_\_\_\_

Will it be necessary to sell your home to buy the next one? \_\_\_\_\_

Is your current home on the market? \_\_\_\_\_ Does your realtor feel it's well priced? \_\_\_\_\_

Have you determined your net proceeds after the sale of this house? \_\_\_\_\_

If you're renting, what is your monthly outlay? \_\_\_\_\_

Do you have a lease? \_\_\_\_\_ When does it expire? \_\_\_\_\_

How long have you been looking for a home? \_\_\_\_\_

Have you seen any homes you liked? \_\_\_\_\_

Why didn't you buy it? \_\_\_\_\_  
\_\_\_\_\_

If we find the right home today, are you ready to make a decision? \_\_\_\_\_

Has anyone given you the opportunity to find out what it takes to financially purchase a home in  
today's market? \_\_\_\_\_

What REALTOR services are important to you now? \_\_\_\_\_  
\_\_\_\_\_

# PREFERENCES

## What Features Would You Like In Your New Home?

	Current Home	Want in New Home	Minimum in New Home
1. Number of bedrooms . . . . .			
2. Number of bathrooms . . . . .			
3. Living Room . . . . .			
4. Dining Room . . . . .			
Separate . . . . .			
5. Kitchen . . . . .			
Eat in . . . . .			
6. Breakfast room . . . . .			
7. Family Room . . . . .			
8. Flooring . . . . .			
Hardwood . . . . .			
Carpet . . . . .			
Ceramic Tile . . . . .			
9. Den/Study/Office . . . . .			
10. Basement . . . . .			
Unfinished . . . . .			
Finished . . . . .			
Walk-out . . . . .			
11. Attic . . . . .			
Finished . . . . .			
Storage . . . . .			
12. Parking . . . . .			
Garage . . . . .			
Carport . . . . .			
On Street . . . . .			
Off Street . . . . .			
13. Patio or Deck . . . . .			
14. Fireplace . . . . .			
Masonry . . . . .			
Wood Stove . . . . .			
15. Other . . . . .			
Home Exterior . . . . .			
Yard Size . . . . .			
Community Amenities . . . . .			
Security System . . . . .			
Hot tub/Jacuzzi . . . . .			
Shed . . . . .			
Ceiling Fans . . . . .			
Fence . . . . .			



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# HOME BUYERS' NOTES

When you are inspecting homes use this sheet to jot down what you liked most about each home. Use this as a "Memory Jogger" when you are comparing notes later.

Home Address: \_\_\_\_\_

Style of Home: \_\_\_\_\_

Price: \_\_\_\_\_

Best Features: \_\_\_\_\_

\_\_\_\_\_

Home Address: \_\_\_\_\_

Style of Home: \_\_\_\_\_

Price: \_\_\_\_\_

Best Features: \_\_\_\_\_

\_\_\_\_\_

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Style of Home: \_\_\_\_\_

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\_\_\_\_\_



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