

Client Intake Form

Name _____ Phone _____ Email _____

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Current Address _____

Smart Phone? Yes No Have you downloaded the Realtor.com app? Yes No

Lender/Credit Score: _____ Time-frame to BUY/SELL: _____

Buyer

MOVE TO INFORMATION: Tell me more about the home you would like to move to:

What areas of town? _____ What school districts appeal to you? _____

How many bedrooms? _____ How many baths? _____ Do you have a price range in mind? _____

What three things must a home have for you to even consider it? _____

Seller

MOVE FROM INFORMATION: Tell me more about the house you want to sell:

Have you considered selling the property yourself? _____ What do you think your house is worth? \$ _____

Could you describe your home to me? # bedrooms _____ # baths _____ # fireplaces _____ Design _____

Basement: None MI Full Daylight Walkout Finished? Yes No Partially

Garage: None 1 2 3+ Stall Attached? Yes No

Family Room – Yes No located (where) _____

Yard: Large or Small , Acres? _____ Fenced? Yes No

Aprox. year home built _____ **School district** _____

Are there any special features about your home that you feel would impact its value?

CONTACT HISTORY NOTES

Initial Contact Date: