

Home buyer intake form

Who is buying, what they are looking for, and proof they can buy it, gathered before the first showing.

About you

Each person answers this for themselves: the client, and their co-buyer too when you send it to them.

Full legal name (required)

Email address (required)

Mobile number

☐ **Photo ID**

A driver's license or passport is fine.

Who is buying

Is anyone buying with you?

☐ Yes

☐ No

Their full legal name

Asked only if the answer to "Is anyone buying with you" is Yes.

What you are looking for

When would you like to move?

☐ Within 3 months

☐ In 3 to 6 months

☐ In 6 to 12 months

☐ Just starting to look

The most you would like to spend

Where would you like to live?

What must the home have?

Financing

How are you paying?

- ☐ With a mortgage, and I am pre-approved
- ☐ With a mortgage, not yet pre-approved
- ☐ In cash

☐ **Your pre-approval letter**

Asked only if the answer to “How are you paying” is With a mortgage, and I am pre-approved.

☐ **Proof of funds**

A recent bank or brokerage statement showing the money for the purchase or the down payment.