

## Buyer Consultation Checklist

### Buyers Legal Names

Buyer 1: \_\_\_\_\_

Buyer 2: \_\_\_\_\_

(should match driver's license)

### Buyers Contact Information

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

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Preferred method of contact: \_\_\_\_\_

### Marital History

Marriage?  Yes  No

If yes, Spouse's Name: \_\_\_\_\_

Date of Marriage: \_\_\_/\_\_\_/\_\_\_

### How will Title be held?

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

Trust, LLC, Corp., etc.?  Yes  No

If yes, need copy of Trust Agreement or LLC/Corp. Documents.

**Mail Out?**  Yes  No

**Power of Attorney?**  Yes  No

**Does buyer have a valid driver's license?**

Yes  No

**Has buyer secured funds for closing?**

Yes  No

**Does buyer have a pre-approval letter or proof of funds?**  Yes  No

### Lender's Contact Information

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### Property Must Haves

square-footage range: \_\_\_\_\_

beds: \_\_\_\_\_

baths: \_\_\_\_\_

garage: \_\_\_\_\_

other must haves

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

### Property Wants

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Things to review prior to contract

Buyer's Rep Agreement

Broker Compliance Docs

IABS

Earnest money and option fee- 2 checks that will be cashed.

Buyer estimated costs

others:

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

### NOTES:

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

