

## QUESTIONNAIRE

This questionnaire is designed to establish what is important to you. It will assist us in building your initial purchase model and time line plus identify search area locations.

### Current home (if owned)

- Old listing if you have it, total square footage, # of levels, what features you liked, dimensions of major rooms
- What features would you change or add in your next house?
- Do you have to sell or lease your current house to qualify to buy your new home?
- How much total cash do you conservatively anticipate netting from its sale? Max total cash to work with?

### If Renting

- Lease termination date?
- Required notice?

### New home

- What are your top 5-6 prioritized features you require in your next house? (safe, top neighborhood is a given)
- Location - what are your top 3-5 prioritized postal/town locations?
- What is your max commute time? Would you be driving your own car? Would you take advantage of rail or metro to commute if available?
- Any special floor plan needs?
- Go online and send us addresses of 3-5 possible new home examples that appeal to you (priced high, med and low). Highlight what features you particularly liked.
- Identify any other important factors we should be aware of.
- Financing - preferred type of loan? fixed? ARM?
- Taxes - do you itemize or take the standard deduction?
- Important interests - places of worship, hobbies, children's sports, family and friends.
- Summary statement of income (salary or commission), total monthly debts, total liquid cash and best guess credit scores.
- First Meeting - Send us 3 dates in 90 minute time slots when you are available to meet. We will need all your completed paperwork 3 days before our scheduled meeting time in order to create your initial purchase models.

## **PURCHASER INFORMATION**

Name \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Marital Status \_\_\_\_\_

Telephone #'s: Home \_\_\_\_\_ Cells \_\_\_\_\_ Email \_\_\_\_\_

Employer (1) \_\_\_\_\_ Office # \_\_\_\_\_ Email \_\_\_\_\_

Employer (2) \_\_\_\_\_ Office # \_\_\_\_\_ Email \_\_\_\_\_

Annual Income (base salary) \$ \_\_\_\_\_

Spouse's Income (base salary) \$ \_\_\_\_\_

Over, comm, bonus Income \$ \_\_\_\_\_

(2 year average on tax forms)

Other Income \$ \_\_\_\_\_

Total Annual Income \$ \_\_\_\_\_

Present Mortgage Payment

Or Rent (Circle One) \$ \_\_\_\_\_

Mortgage Payment Breakdown:

Principal \$ \_\_\_\_\_ Interest \$ \_\_\_\_\_

**Gross Monthly Income: \$ \_\_\_\_\_**

**Gross Monthly Expenses: \$ \_\_\_\_\_**

**Net Monthly Income**

**(Excess after expenses): \$ \_\_\_\_\_**

**Taxes? Currently over**

**or under withheld?: \$ \_\_\_\_\_**

Are there any other financial/credit conditions not listed above that might affect your ability to obtain financing? (Bankruptcy, Lien, Judgements, Credit History, Etc.) Yes \_\_\_\_ No \_\_\_\_  
(If yes please explain) \_\_\_\_\_

### **ASSETS**

Cash Available to purchase \$ \_\_\_\_\_

Stocks, Bonds, 401K \$ \_\_\_\_\_

Real Estate (Market Value): \$ \_\_\_\_\_

Gift money \$ \_\_\_\_\_

Totals \$ \_\_\_\_\_

### **DEBTS**

Auto \$ \_\_\_\_\_ \$ \_\_\_\_\_

Auto \$ \_\_\_\_\_ \$ \_\_\_\_\_

Real Estate \$ \_\_\_\_\_ \$ \_\_\_\_\_

All Charge Cards \$ \_\_\_\_\_ \$ \_\_\_\_\_

All Other Debts \$ \_\_\_\_\_ \$ \_\_\_\_\_

Totals \$ \_\_\_\_\_ \$ \_\_\_\_\_

### **BUDGETARY ANALYSIS**

_____	GROSS ANNUAL INCOME (ALL SOURCES)
_____	GROSS MONTHLY INCOME
_____	FEDERAL & STATE WITHOLDINGS-MONTHLY
_____	FICA/RETIREMENT - 401K'S, ETC
_____	PERSONAL PROPERTY TAXES
_____	DISCRETIONARY SPENDING-POCKET \$,EATING OUT
_____	RENT/MORTGAGE (CIRCLE ONE)
_____	UTILITIES (ELEC,GAS,WATER ONLY)
_____	MEDICAL (DENTAL,MED,HOSPITAL)
_____	GROCERIES/HOUSEHOLD PRODUCTS
_____	AUTO LOAN(S) & BALANCE(S)
_____	GASOLINE
_____	MAINTENANCE COSTS (CARS,APPLIANCES,ETC.)
_____	INSURANCE'S (AUTO,HEALTH,LIFE - MONTHLY)
_____	TITHE/CHARITIES
_____	CLOTHING
_____	MISC-VACATIONS, GIFTS, HOLIDAYS,ETC.
_____	OTHER
_____	OTHER
_____	OTHER
_____	TOTAL MONTHLY EXPENSES
_____	<b><u>NET MONTHLY INCOME</u></b> (INCOME - EXPENSES)