



# Client Consultation Assignment 1: Client Information & Home Wish List



At \_\_\_\_\_ Realty, we work by referral with the desire to build long-term relationships with our clients. With patient, open and frequent communication, we assist our clients before, during and after each real estate transaction. Our goal is to help you fulfill your dream of buying a home in a personal, relaxed and professional manner. We promise to support you with comprehensive market information and expert advice.

### CLIENT CONTACT INFORMATION

Legal Name(s) \_\_\_\_\_

Nick Name(s) \_\_\_\_\_

Phone (work) \_\_\_\_\_

Fax \_\_\_\_\_

Mobile \_\_\_\_\_

Email \_\_\_\_\_

Mailing Address \_\_\_\_\_

\_\_\_\_\_

During your transaction we may need to have documents delivered to you during the day at your place of work. Please include any required delivery instructions.

### CLIENT PERSONAL BACKGROUND

How many people are in your family? Please list names, ages, gender, and relationship (dad, mom, etc.) below:

Name: \_\_\_\_\_ Age: \_\_\_\_\_ Gender: \_\_\_\_\_ Relationship: \_\_\_\_\_

Name: \_\_\_\_\_ Age: \_\_\_\_\_ Gender: \_\_\_\_\_ Relationship: \_\_\_\_\_

Name: \_\_\_\_\_ Age: \_\_\_\_\_ Gender: \_\_\_\_\_ Relationship: \_\_\_\_\_

Name: \_\_\_\_\_ Age: \_\_\_\_\_ Gender: \_\_\_\_\_ Relationship: \_\_\_\_\_

Where do you currently live? Why are you moving?  
\_\_\_\_\_  
\_\_\_\_\_

Any pets? \_\_\_\_\_

Current Career Field: \_\_\_\_\_

Hobbies/weekend lifestyle \_\_\_\_\_

*Thank you so much for the time you have taken to provide this information. We look forward to working for you.*



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## CLIENT FINANCIAL BACKGROUND For Loan Pre-Qualification (\*denotes info given to clients as part of project)

DOB (date of birth) \_\_\_\_\_

Education Level \_\_\_\_\_

Years at Current Home Address \_\_\_\_\_

Employer \_\_\_\_\_

Job Title \_\_\_\_\_

Years at Company \_\_\_\_\_

Years in Similar Industry \_\_\_\_\_

**Annual Family Income\*** \_\_\_\_\_

**Maximum Down Payment\*** \_\_\_\_\_

**FICO Score\*** \_\_\_\_\_

**Car Loan Amount\*** \_\_\_\_\_

**Credit Card Debt\*** \_\_\_\_\_

Maximum Monthly Mortgage Payment \_\_\_\_\_

(Mortgage includes principle, interest, taxes & insurance PITI. This amount should not exceed 28 percent of your gross monthly income. To calculate, multiply your annual salary by 0.28, then divide by 12 (months). The answer is your maximum housing expense ratio.)

List any other assets (IRA, 401k, savings, stock, cars, etc.) \_\_\_\_\_

\_\_\_\_\_

Have you declared bankruptcy in the last 7 years? \_\_\_\_\_

Any foreclosures? \_\_\_\_\_

Any judgments against you? \_\_\_\_\_

Delinquent on federal debt? \_\_\_\_\_

Child support or alimony? \_\_\_\_\_

Co-signor on a note? \_\_\_\_\_

US Citizen or Legal Alien or Permanent Resident? \_\_\_\_\_

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# Client Consultation Assignment 1:

## Client Information & Home Wish List



### HOME WISH LIST: PREFERENCES FOR YOUR NEW HOME

Type of home       Single Family       Duplex       Condo       Townhouse       Any

Square foot range\* \_\_\_\_\_ Year Built Range \_\_\_\_\_

Number of\*      \_\_\_\_\_ Bedrooms\*      \_\_\_\_\_ Full Baths\*      \_\_\_\_\_ Half Baths\*

Stories       1       2       Either

Condition       Nearly perfect       Needs work or updating  
 A real fixer upper       Needs cosmetic work

When would you like to move into your new home \_\_\_\_\_

What cities, specific areas and/or subdivisions are you most interested in (search area)\*

\_\_\_\_\_

To what locations do you commute \_\_\_\_\_

\_\_\_\_\_

What driving time is acceptable \_\_\_\_\_

What personal preferences do you have for your next home (i.e. mountain view, bonus room for music studio, low maintenance yard, 3-car garage, elementary school is within walking distance, etc.)

\_\_\_\_\_

\_\_\_\_\_

Describe the "feel" your ideal neighborhood

\_\_\_\_\_

\_\_\_\_\_

Are there any other specific features (unique or "must have" factors such a pool, washer & dryer, home theater, big lawn, fireplace, etc.) that you want in your home?

\_\_\_\_\_

\_\_\_\_\_

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