



Buyer Consultation Questionnaire

Instructions:

Save a master copy of this file as your consultation template. The questions on this form cover the range of topics you might want to discuss with buyers. You'll tailor your consultation depending on each buyer's situation. For example, the questions you ask of most first-time home buyers will include some topics that you wouldn't cover with people buying a vacation home and vice versa. Follow these steps:

1. Prior to each buyer consultation, make a copy of the Word document. Use colored paper if you want it to stand out from all the other documentation that you use when working with buyers.
2. Mark the questions that are appropriate for the consultation so you'll remember to ask about everything you want to know.
3. Record answers in writing. Use the back of the sheet if necessary
4. Ask follow up questions to clarify the true needs and wants of your buyers.
 - What exactly do you mean by _____? (e.g. large kitchen, privacy, etc.)
 - What does having _____ do for you? (e.g. large kitchen, privacy, etc.)
 - Can you explain that in more detail?
 - How does that make you feel?
 - Why do you suppose that is?

Review Prequalification Information

Ask these questions to confirm what you've been told previously or if you don't know answers yet.

Name of Buyer 1 _____ Phone _____ Email _____

Name of Buyer 2 _____ Phone _____ Email _____

1. Who is the primary contact with me and what is the best time and way to reach you?
2. What is prompting your move?
3. When do you need to be in your new home?
4. Are you preapproved for a mortgage?
5. What is your price range?
6. If we found a home today that meets all of your needs and as many of your wants as possible, would you make an offer?

Lifestyle

1. Who will be living in the home you purchase?
2. Will anyone else be spending more than an occasional overnight stay (e.g., parents)?
3. Describe your lifestyle. What do you enjoy doing at home? (e.g., Do you do a lot of entertaining? How do you spend your time in the evenings and on the weekends?)
4. Does your home need to accommodate any special needs?
5. Do you have any pets?
6. Do you have anything special that needs to be accommodated such as athletic equipment, fine art, large furniture, or a large collection?
7. When people come to your home, what do you want your home to say about you?
8. Is there anything I should know about your lifestyle that I have not asked?

Location

1. Tell me about your ideal location.
2. What is your maximum commute time and distance?
3. What is your work address?
4. Are schools important?
5. Is there a particular view you are seeking (e.g., skyline, lake, mountains)?
6. What else is important about your location?

House – General

1. Do you have a preference for when the house was built?
2. Do you want a house in move-in condition or are you willing to do some work on it?
3. When people come to your home, what do you want your home to say about you?
4. Do you want to have a swimming pool or hot tub?
5. Are you looking for any structures such as a greenhouse or shed?

House – Structure/Exterior

1. What type of home are you looking for (e.g., single-family, condo, townhouse, etc.)?
2. Approximately what size house are you looking for (square footage)?
3. How many stories?
4. What size lot would you like?
5. What architectural styles do you prefer?
6. What type of exterior siding will you consider?
7. Do you want a porch or deck?
8. What are you looking for in terms of a garage (e.g., attached, carport, etc.)?
9. What other exterior features are important to you?

House – Interior

1. What kind of style do you want the interior of your home to have (e.g., formal, casual, cozy, traditional, contemporary)?
2. What kind of floor plan do you prefer (e.g., open vs. walls between all living spaces)?
3. In general, what are your likes and dislikes for the interior of your home?

Bedrooms

1. How many bedrooms do you need?
2. How will each of those rooms be used?
3. What are your preferences for the master bedroom?

Bathrooms

1. How many bathrooms do you need?
2. What are your needs for each of the bathrooms?

Kitchen

1. What features must your kitchen have (e.g., breakfast area, types of appliances, etc.)?
2. What finishes do you want (e.g., counter tops, flooring, appliances, etc.)?
3. What are your likes and dislikes for the kitchen?

Dining Room

1. Would you like the dining room to be part of the kitchen configuration? What about the living room?
2. What size dining room table do you have?

Living Room/Family Room

1. Describe your likes and dislikes.
2. Do you want a fireplace?
3. What size room(s) do you have in mind?
4. What other rooms do you need or want?
5. What else should I know about the inside of the house you are looking for?

Summary

1. What are the top five things your home *needs* to have?
2. Beyond those five things, what is something else you really *want* to have?
3. If you could have something else, what would that be?
4. If you could have one last thing to make this your dream home, what would that be?