

# REAL ESTATE CLIENT PROFILE TEMPLATE

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REALTOR	CONTACT	DATE

## CONTACT INFORMATION

CLIENT NAME 1	PREFERRED CONTACT METHOD	BEST TIME TO CONTACT
<b>ADDRESS</b>		
WORK PHONE	HOME PHONE	CELL PHONE
FAX	EMAIL ADDRESS	
CLIENT NAME 2	PREFERRED CONTACT METHOD	BEST TIME TO CONTACT
<b>ADDRESS</b>		
WORK PHONE	HOME PHONE	CELL PHONE
FAX	EMAIL ADDRESS	

## HOUSING DETAILS

REAL ESTATE INTEREST		TIMELINE	
	SELL		TODAY
	BUY		30-90 DAYS
	RENT		90-120 DAYS
	LEASE		6-12 MONTHS
	PURCHASE		OVER A YEAR
PROPERTY TYPE		INTENDED USE	
	SINGLE FAMILY		PRIMARY RESIDENCE
	2-4 UNITS		SECOND HOME
	CONDO / TOWNHOME		RENTAL
	APARTMENT		INVESTMENT
	LAND		REHAB
	COMMERCIAL		OTHER

HOUSING DETAILS *continued*

<b>PRICE RANGE</b>	LOW:		HIGH:	
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<b>AGE OF HOME</b>	BUILT PRIOR TO:		BUILT AFTER:		NEW CONSTRUCTION PREFERRED	
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PREFERRED LOCATION / AREA		
CITY	ZIP CODE	SCHOOL DISTRICT

PREFERRED STYLE

NUMBER OF STORIES	
NUMBER OF BEDROOMS	
NUMBER OF BATHS	
NUMBER OF CARS	
GARAGE	
BASEMENT	
FIREPLACE	
FENCED YARD	
OTHER AMENITIES / COMMENTS	

# PLANNING FOR YOUR HOME

FINANCE			
<input type="checkbox"/>	PAYING CASH	<input type="checkbox"/>	REHAB LOAN
<input type="checkbox"/>	MORTGAGE	<input type="checkbox"/>	DOWN PAYMENT ASSISTANCE
<input type="checkbox"/>	REFINANCE	<input type="checkbox"/>	NEED SELLER CONCESSIONS
<input type="checkbox"/>	HOME EQUITY	<input type="checkbox"/>	
<input type="checkbox"/>	OTHER:		

CURRENT MORTGAGE COMPANY			
LOAN OFFICER:			
CONTACT INFO:			
<input type="checkbox"/>	PRE-QUALIFICATION	<input type="checkbox"/>	DU APPROVED
COMMENTS:			

LOAN TYPE			
<input type="checkbox"/>	FHA	<input type="checkbox"/>	VA
<input type="checkbox"/>	CONVENTIONAL	<input type="checkbox"/>	USDA
<input type="checkbox"/>	NSP	<input type="checkbox"/>	
<input type="checkbox"/>	OTHER:		
DOWN PAYMENT ASSISTANCE PROGRAM:			
YOUR DESIRED MORTGAGE PAYMENT RANGE:			

CHECK IF "YES"	
<input type="checkbox"/>	Have you recently ordered a copy of your Credit Report?
<input type="checkbox"/>	Have you talked with a Mortgage Planner?
<input type="checkbox"/>	Have you talked with a Housing Counselor?
<input type="checkbox"/>	Have you completed a loan application?
<input type="checkbox"/>	Have you applied online?
<input type="checkbox"/>	Do you have your down payment?
<input type="checkbox"/>	<i>If yes, is the down payment a gift?</i>
<input type="checkbox"/>	Are you paying the closing cost?
<input type="checkbox"/>	Is the home served by a well or septic tank?
<input type="checkbox"/>	Is there a home warranty?
<input type="checkbox"/>	Any inspections on the property?
<input type="checkbox"/>	Are you self-employed?

DO YOU HAVE A HOME TO SELL OR RENT?	
<input type="checkbox"/> YES	<input type="checkbox"/> NO
When does your contract expire?	
PROPERTY ADDRESS	
PURCHASE PRICE	
CLOSING DATE	
ATTORNEY	
PROPERTY TYPE <i>SF, condo, etc.</i>	
HOA / CONDO FEES	
Does the property require repairs? If yes, what type of repairs?	

REFINANCE	
CURRENT LENDER	
<b>CURRENT PAYOFF</b>	
1 <sup>ST</sup> MORTGAGE: \$	2 <sup>ND</sup> MORTGAGE: \$
Any other liens on the property?	<input type="checkbox"/> YES <input type="checkbox"/> NO
If yes, please explain:	
Are the property taxes up to date?	<input type="checkbox"/> YES <input type="checkbox"/> NO
ANNUAL TAXES:	
Is the Hazard Insurance up to date?	<input type="checkbox"/> YES <input type="checkbox"/> NO
If no, please explain:	
Is flood insurance required?	<input type="checkbox"/> YES <input type="checkbox"/> NO
Does the home need any repairs, corrections, or updating?	<input type="checkbox"/> YES <input type="checkbox"/> NO
If yes, please explain:	
Is the home served by a well or septic tank?	

## PERSONAL PROFILE

Quality of relationships with family and friends?	
Describe your workspace	
Any sleep problems?	
Describe your to-do list or number of projects in process	
Are you always on time or always late?	
Are you impulsive? When?	
Top 5 strengths	

Favorite Color		Favorite Cartoon or TV Character	
Favorite Flower		Favorite Type of Music / Artist	
Favorite Fragrance		Favorite Spot or Location	
Favorite Candy / Sweet / Food		Favorite Charity	
Favorite Restaurant or Type of Cuisine		Astrological Sign	

PERSONAL PROFILE *continued*

<p>What hobbies / sports do you enjoy and / or play?</p>	
<p>Consistent Exercise? What kind(s)? How often? What kind do you most enjoy? How do you make exercise enjoyable?</p>	
<p>What do you do for fun?</p>	
<p>Do you like to read? If so, what? How often do you read?</p>	
<p>Do you like to write or journal?</p>	
<p>What's the most thoughtful and / or appreciated gift you've ever received?</p>	
<p>How do you treat yourself special?</p>	
<p>What sort of stores do you enjoy getting gift certificates to?</p>	
<p>What do you enjoy collecting?</p>	
<p>What's your idea of the perfect mini-vacation?</p>	
<p>Is there anything else you feel would be helpful to share?</p>	

**DISCLOSURE:** I agree to: Provide equal professional service without regard to the race, color, religion, sex, handicap, familial status, or national origin of any prospective client, customer, or of the residents of any community.

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