



Name _____

Phone () _____ **Email** _____

I Individual Demographic Yes No

- Are you familiar with this area? Yes No
- Where do you live now? Location: _____
- How long have you been looking? 30 60 90 120+
- Have you been looking in this area? Yes No
- Have you seen a lot of properties? Yes No
- Have you purchased property before? Yes No
- What have you liked about the properties you have seen? Explain: _____

Special Property Questions:

[Empty box for special property questions]

II Property Related Demographic Profile Yes No

- Do you work nearby? Yes No
- What is your occupation? Type: _____
- How many people in your family? 2 3 4 5+
- Have you identified a price range? Amount: _____
- Have you met with a lender? Yes No
- When is the timing of your move? 30 60 90 120+
- Has anyone sat down and talked with you about what's happening in the market? Yes No

III Appointment or Meeting for Buyer Assistance

- How soon can we meet together again? _____
- When would be a good time to meet? _____
- Which time would be best for you? _____ or _____?
- Let's meet together on _____ or _____ at _____ or _____.

IV Appointment Made

Our appointment is scheduled for _____ at _____.

I will call you the day before to confirm our appointment. When will be a good time to call? At what phone number? _____

V Confirmation Required

Confirmation required

Reestablish relationship.

I will be calling to button down our appointment for _____ at _____. You can count on me to be there, can I count on you? "Yes." Great! I look forward to seeing you _____ at _____.

