



Name _____

Phone () _____

Email _____

I Individual Demographic

Yes

No

- 1. Are you familiar with the area? Yes No
- 2. Where do you live now? Location: _____
- 3. How long have you been looking? 30 60 90 120+
- 4. Have you been looking in this area? Yes No
- 5. Have you seen a lot of properties? Yes No
- 6. Have you ever purchased property before? Yes No
- 7. 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

- 1. Do you work in the area? Yes No
- 2. What kind of work do you do? Type: _____
- 3. How many people in family? 2 3 4 5+
- 4. In what price range are you looking? Amount: _____
- 5. Have you been pre-qualified by a lender? Yes No
- 6. How soon are you moving? 30 60 90 120+
- 7. Has anyone sat down and talked with you about what's happening in the market? Yes No

III Appointment or Meeting for Buyer Assistance

- 1. How soon can we meet together again? _____
- 2. When would be a good time to meet? _____
- 3. Which time would be best for you? ____ or ____?
- 4. 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 _____.

