

## Confidential Buyers Profile

The information you provide will help me find the best property for you as quickly as possible.

Your information will remain confidential with me and will not be released to third parties.

However, an exception is if you have not yet hired me to be your Buyers Agent. Until you do – and, again, due to time considerations, I don't work with buyers except as a Buyers Agent -- do not provide me **information that would benefit the seller**. As a Sellers Subagent North Carolina real estate law requires me to provide the seller that information.

Be certain to read and understand Working with Real Estate Agents before providing any personal information to a real estate agent. I have included that information with this Profile. Please ask me any and all questions you have until you are certain you understand what, and what not, to confide in a real estate agent.

Please keep these thoughts in mind:

- Because the questions cover a wide range of interests, answer only those that apply to you and your needs. Answer only the questions you are comfortable with.
- It will be very helpful if you add anything the questions don't address.
- It's very important for me to understand not just what **features** [number of bedrooms, square footage] you have in mind but also what **qualities of life** are important to you and that you hope to find in the property you purchase.

Name \_\_\_\_\_

Address \_\_\_\_\_

Contact Information [circle your preferred means for me to contact you]:

- Home Phone \_\_\_\_\_ Best time: \_\_\_\_\_
- Home Fax \_\_\_\_\_
- Work \_\_\_\_\_ Best time: \_\_\_\_\_
- Work Fax \_\_\_\_\_
- Cell \_\_\_\_\_ Best time: \_\_\_\_\_

Do you text? What is your preferred means for me to communicate with you:

\_\_\_\_\_

- Other \_\_\_\_\_
- Email address \_\_\_\_\_

Can you receive and open pdf. Attachments?  Yes  No

The kind of property I'm looking for is:

- A home
- Only new construction
- New OR existing is OK
- On a lot
- With acreage  
How many acres \_\_\_\_\_
- A lot to build on
- Acreage
- How many acres \_\_\_\_\_

Other: \_\_\_\_\_

Are you familiar enough with the area to know where you want to locate?  Yes  No

If yes, where? \_\_\_\_\_

If not, what's important to you:

- In town. Which town: \_\_\_\_\_
- Out in the county
- A subdivision
- A resort development
- Seclusion
- Proximity to dining. If yes, what is the minimum drive time that's OK:  
 10-15 minutes  20-30 minutes  45 or more minutes
- Proximity to shopping. If yes, what is the minimum drive time that's OK:  
 10-15 minutes  20-30 minutes  45 or more minutes
- Proximity to skiing. If so, how many minutes drive \_\_\_\_\_
- Proximity to hiking. If so, how many minutes drive \_\_\_\_\_
- Proximity to golf. If so, how many minutes drive \_\_\_\_\_
- Proximity to horse trails. If so, how many minutes drive \_\_\_\_\_
- Proximity to a major medical facility. If so, how many minutes drive \_\_\_\_\_
- Proximity to a health club. If so, how many minutes drive \_\_\_\_\_
- Proximity to something else?  
If so, what is it and where is it located: \_\_\_\_\_

What else would you like to tell me about where you'd like to locate: \_\_\_\_\_

I plan to:

- Live in the area year-round
- Use my property only in the summer
- Place the home in a vacation rental program

How crucial is winter accessibility?

- I must get out each day regardless of the weather.
- It's important that I get out as much as possible, but I can manage being homebound a few days in the winter.
- It's OK to be homebound several days at a time.

Type of access:

A gravel road is: preferable  OK  out of the question

A gravel driveway is: preferable  OK  out of the question

If you are looking for a home:

What price range: \_\_\_\_\_

What size:

Square footage range \_\_\_\_\_

Number of bedrooms \_\_\_\_\_

Number of bathrooms \_\_\_\_\_

If you are looking for a lot or acreage, describe your ideal property: \_\_\_\_\_

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If you are looking for a home:

	Must have	Prefer	Not necessary	Comments
Master bedroom suites rather than bedrooms				
One level living with dead flat entry into the home				
Cathedral ceilings				
Hardwood floors				
Tile floors				
Carpeting				
Tile counters				
Jacuzzi/whirlpool tub				
Formal [separate room] dining room				
Fireplace				
Den/family room				
Computer room				
Broadband				
Satellite				
Cable				
Eat-in kitchen				
Bonus room				
Other: describe				
Other: describe				
Other: describe				

How important is a view? Crucial  Nice but not necessary  Not important

Describe your ideal view: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Do any of these describe the view you have in mind?

- Long-range
- Layers of mountains receding in the distance
- Across the valley
- Pasture
- Looking up at a mountain

[If you'd like to, number in order of desirability.]

Do you desire:			
	Crucial	Nice, not necessary	Not important
A creek			
A strong stream [noisy, rushing]			
River property			
Horse property [pasture with water]			

What would you like to tell me about any of these? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What other features do you have in mind? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How many vehicles will you need to provide for? Circle any that require covered space?

- Personal cars \_\_\_\_\_
- RV \_\_\_\_\_
- Boat \_\_\_\_\_
- Camper \_\_\_\_\_
- Other \_\_\_\_\_

Do you have a specific architectural style[s] in mind?  **Yes**  **No**

If so, describe it: \_\_\_\_\_

Is that style:  necessary  preferred

Do you have a specific exterior finish in mind?  **Yes**  **No**

If so, describe it: \_\_\_\_\_

Is that style:  necessary  preferred

Do you have special storage needs or closet requirements?  **Yes**  **No**

If so, describe them: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Do you like to entertain:  **Yes**  **No**  Formal  Casual

Comments: \_\_\_\_\_

\_\_\_\_\_

Will you need extra space for overnight guests?  **Yes**  **No**

Separate bathroom  **Yes**  **No**

Concerning your children/guests, do you:

- Want/need to be in the middle of them
- Love them, but need private space also
- Need space to convert on occasion, but not permanently
- Need space for others [e.g., elderly/handicapped/live-in help]

Do you have furniture that needs to be considered?

Because of its style: Describe this need: \_\_\_\_\_

\_\_\_\_\_

Very large? Which room and what are its dimensions: \_\_\_\_\_

Any other furniture considerations? \_\_\_\_\_

\_\_\_\_\_

Will you need to match any colors from your present furnishings in your new home? It will be helpful for you to bring color or pattern samples when we are viewing possible homes, unless you definitely plan to paint the new interior. Throw pillows, arm covers, swatches are possibilities.

Is there anything else you'd like to tell me about needs and desires from your new home's interior?

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Do you currently rent?  **Yes**  **No**

Do you own your own home?  **Yes**  **No**

\_\_\_\_ Number of bedrooms

\_\_\_\_ Number of bathrooms

Formal dining room?  **Yes**  **No**

What do you like about your current home? \_\_\_\_\_

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What do you dislike about your current home? \_\_\_\_\_

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Will it be necessary to sell your home before you purchase a home here?  **Yes**  **No**

If yes, is it currently on the market?  **Yes**  **No**

Is it currently under contract?  **Yes**  **No**

If so, when will it close? \_\_\_\_\_

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When do you need to close on your home here? \_\_\_\_\_

How urgently do you need to close by that date?  Very urgent  Not urgent  Strongly desired

Does anyone in your family have special needs? If so, describe what accommodations they require:

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Do you have children? What are their ages, sex, and names? What would you like me to know about their needs in your new home?

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Do you have pets with specific needs? What kind and what are their names? Describe their needs:

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What other special features about your home or the home's surroundings are you looking for:

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Are there any other criteria that I haven't mentioned and that are important to you?

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What do you absolutely NOT want in your new home or its surroundings?

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Do you have recreation needs/preferences? Please describe:

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What do you consider is your maximum monthly house payment? \_\_\_\_\_

Approximately what amount will be your down payment? \_\_\_\_\_

Does this amount include funds you will also use for closing costs?  **Yes**  **No**

Is there anyone else besides you and your spouse [if appropriate] who will of necessity be a part of the decision on which property you purchase? If so, who and what is your relationship?

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Will this person also assist your in funding your purchase?  **Yes**  **No**

Have you discussed financing with a lender?  **Yes**  **No**

If so, please share the name and phone number of your lender:

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Have you already selected a real estate attorney to handle the closing?  **Yes**  **No**

If so, please share the name and phone number of your attorney?

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How long have you been looking for a property?

Have you seen any homes you like?  **Yes**  **No** If yes, why didn't you buy it?

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Once we find a home that meets your most important criteria, are you ready to write an Offer to Purchase?  **Yes**  **No**

If not, why not? What must happen for you to be ready to purchase? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Is there any information you need prior to making a home purchase decision of a particular nature, such as special educational needs, distance to airport, employment opportunities, or anything else?

**Yes**  **No** If yes, tell me your needs:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please take a moment to list the five MOST important qualities you will want in your new home and its location. Place them in order of their importance to you – even if you've already mentioned them.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Personal Information**

1. What would you like to tell me about yourself?



4. What would happen if you didn't find a home by then?

**Needs and Priorities**

1. Of all the things you're trying to accomplish in this move, what is the most important?

2. If you would, bring to mind the home in which you grew up. What were some of your favorite parts of it? Why?

5. What is your favorite room in a home? Why?

6. Help me visualize how you'd like your next home to look.

a. What are the most important features to you? Why?

b. What are the 3 things you can't live without? Why?

c. What is the 1 thing you absolutely would not give up? Why is that? What is it that you like about that? How will that make you feel? How much latitude do you have on that requirement?

8. How do you feel about doing decorating or repairs on a home?

9. How do you feel about buying a brand new home?

**Dominant Motivations**

\_\_\_\_\_ Family      \_\_\_\_\_ Economic      \_\_\_\_\_ Prestige

\_\_\_\_\_ Individualist      \_\_\_\_\_ Amenity      \_\_\_\_\_ Security/Health

\_\_\_\_\_ Other (describe)

**Financial Qualifications**

1. How did you decide on the price range you have in mind?

2. How much over that amount would you be willing to go if the home was really appealing to you?

3. The home you have described would sell for about \$ \_\_\_\_\_. How does that feel to you?

4. What monthly payment are you comfortable with?

7. What is the maximum payment you would consider?
  
8. How did you decide on that amount?
  
9. The lender will require 4 items of financial information: Cash, Income, Debt, and Credit. Would you like to go through each of these now?
  - a) How much total cash had you planned to invest?
  
  - b) How much of your present home's equity had you planned to invest?
  
  - c) What is your annual combined gross income?
  
  - d) What type of long term obligations, such as car payments or loan payments, do you have each month?
  
  - e) Is there anything that will show up on a credit report that we should resolve before loan application?

### **The Process**

The last time you bought a house, could you tell me about the process you went through to find that house?

1. How did you start looking?



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