

Date: _____

Name: _____ Spouse Name: _____

Property Address: _____ City: _____ State: _____ Zip: _____

Phone #s – Mobile: _____ Spouse Mobile: _____ Home: _____ Work: _____

Email: _____ Spouse Email: _____

Family / Children (include ages): _____

1. Have you spoken with any other agents? ☐ Yes ☐ No _____
2. Have you considered selling the home yourself? ☐ Yes ☐ No _____
3. Why do you want to move? _____
4. Do you know where you want to move to? _____
5. What date do you want to be moved by? _____
6. Are there any negatives to not moving by then? (suggest lifestyle sacrifices, job, costs, schools, family, etc.)

7. Tell me all the negatives of not moving at all? (same suggestions above)

8. Tell me all the benefits of buying a new home: (dig deep & find out WHY?)

9. On a scale of 1 to 10, how would you rank your motivation to move? With 10 being highly motivated: _____
10. When did you buy your home? _____ What price did you pay? _____
11. Do you know how much you still owe on it? _____
12. Have you made any major improvements to the home since? ☐ Yes ☐ No

13. Do you happen to have an idea as to what you think it's worth, or should sell for? _____
14. Do you have a price you won't sell your home below? _____
15. Tell me about the positive & negative features of your home:

16. How many BR: _____ Baths: _____ SqFt: _____ Stories: _____ Other: _____
17. How did you hear about me/us? _____
18. Are you interviewing any other agents? ☐ Yes ☐ No Who? _____ When? _____
19. "Thank you! The next step is for me to take a quick look at your home and I can answer any other questions you may have. Then you can decide what we do next. How does that sound?" (pause)
"Great! Does 4:30 tomorrow or 5:00 Wednesday work for you?"

Appointment Date/Time: _____

DISC Behavioral Profile: _____ Why? _____