

Date: \_\_\_\_\_ Lead Source: \_\_\_\_\_

Name: \_\_\_\_\_ Spouse Name: \_\_\_\_\_

Property Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone #s – Mobile: \_\_\_\_\_ Spouse Mobile: \_\_\_\_\_ Home: \_\_\_\_\_ Work: \_\_\_\_\_

Email: \_\_\_\_\_ Spouse Email: \_\_\_\_\_

Family / Children (include ages): \_\_\_\_\_

1. Have any other agents shown you homes? ☐ Yes ☐ No  
If Yes, do you have a signed agency agreement? ☐ Yes ☐ No
2. Is anyone buying the home with you? \_\_\_\_\_
3. Are you renting, or do you own a home? ☐ Homeowner ☐ Renter
  - a) HOMEOWNER:
    - Do you need to sell your home before you buy? ☐ Yes ☐ No
    - Have you signed a listing agreement to sell your home? ☐ Yes ☐ No
  - b) RENTER:
    - When does your lease end? \_\_\_\_\_
4. What date do you want to be moved by? \_\_\_\_\_
5. Are there any negatives to not moving by then? (suggest lifestyle sacrifices, job, costs, schools, family, etc.)  
\_\_\_\_\_
6. Tell me all the benefits of buying a new home: (dig deep & find out WHY?)  
\_\_\_\_\_
7. On a scale of 1 to 10, how would you rank your motivation to move? With 10 meaning you must buy as quickly as possible, and 1 meaning you're not sure you'll really buy anything: \_\_\_\_\_
  - What's missing? What would it take to make you a 10? \_\_\_\_\_
8. Do you know where you want to move to? \_\_\_\_\_
9. Will you be paying cash or getting a mortgage? ☐ Cash ☐ Mortgage
10. Have you been pre-approved by a lender? ☐ Yes ☐ No
11. How much will your down payment be? \_\_\_\_\_
12. What price range are you looking in? \_\_\_\_\_
13. How many BR: \_\_\_\_\_ Baths: \_\_\_\_\_ SqFt: \_\_\_\_\_ Stories: \_\_\_\_\_ Other: \_\_\_\_\_
14. What else are you looking for in a home? \_\_\_\_\_
15. Will anyone else be involved in your home buying decision? \_\_\_\_\_
16. "Thank you! I'd love to help you find your perfect home. All that we need to do is to set an appointment so that I can help you find the home you're looking for. Does 4:30 tomorrow or 5:00 Wednesday work for you?"

If "No" use Seller Lead Sheet.

Appointment Date/Time: \_\_\_\_\_

DISC Behavioral Profile: \_\_\_\_\_ Why? \_\_\_\_\_