



PADRAIC JORDAN HOMES

## BUYER INTAKE

Date: \_\_\_\_\_

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

Referral thank you sent? \_\_\_\_\_

### BUYER(S):

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

Cell: \_\_\_\_\_

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

Social Media: \_\_\_\_\_

Address: \_\_\_\_\_

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

Cell: \_\_\_\_\_

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

Social Media: \_\_\_\_\_

Employer/o \_\_\_\_\_

ffice \_\_\_\_\_

location \_\_\_\_\_

Employer/o \_\_\_\_\_

ffice \_\_\_\_\_

location \_\_\_\_\_

### CHILDREN:

### PETS:

### CURRENT HOME:

☐ Own    Need to sell in order to buy? ☐ Yes ☐ No  
Explore bridge loan/HELOC? ☐ Yes ☐ No

☐ Rent    Lease expires: \_\_\_\_\_

Willing to break lease? ☐ Yes ☐ No

### HOME REQUIREMENTS:

Bedrooms: \_\_\_\_\_

Bathrooms: \_\_\_\_\_

Square ft: \_\_\_\_\_

Lot size: \_\_\_\_\_

Laundry: \_\_\_\_\_

Yard: \_\_\_\_\_

Basement: \_\_\_\_\_

Parking: \_\_\_\_\_

Storage: \_\_\_\_\_

AC: \_\_\_\_\_

### SCHOOL/GEO-ZONE:

Elementary: \_\_\_\_\_

Middle: \_\_\_\_\_

High school: \_\_\_\_\_

Tell me more about what brought you to me today?

Describe your dream home for today:



What neighborhoods are you considering?

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What is the maximum commute time you will consider?

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What type/size of cars do you drive? Do you need garage/off-street parking? Do you need EV plug in?

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Tell me more about your recreational hobbies, do you need a place to store your outdoor equipment?

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Are there any must-have or deal-breaker features that are top of mind for you?

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What does your timeline look like? When would you like to have this move completed?

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Additional notes:

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### **FINANCES:**

Have you begun a conversation with or received pre-approval from a lender?

<input type="checkbox"/> Yes	Lender: _____	Approval amt: _____
	Contact: _____	Loan type: _____
<input type="checkbox"/> No	Intro to lender: _____	Intro date: _____
	Intro to lender: _____	Intro date: _____

What percentage funds do you have saved up/plan to put down?

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Do you anticipate receiving gift funds from a family member?

☐ Yes ☐ No

Do you need to liquidate any funds such as stocks for the purchase?

☐ Yes ☐ No



**EDUCATION DAY SCHEDULED FOR:** \_\_\_\_\_