

Real Estate Agent Checklist for New Buyers

By Checklister

- ☐ Client Information
 - ☐ Full Name
 - ☐ Contact Number
 - ☐ Email Address
 - ☐ Preferred Method of Contact
- ☐ Budget and Financing
 - ☐ Maximum Budget for the Property
 - ☐ Pre-approved Mortgage Amount (if any)
 - ☐ Down Payment Amount
- ☐ Property Preferences:
 - ☐ Type of Property
 - ☐ Number of Bedrooms
 - ☐ Number of Bathrooms
 - ☐ Desired Square Footage
 - ☐ Preferred Neighborhood(s)
 - ☐ Specific School District
 - ☐ Proximity to Work or Public Transportation
- ☐ Property Features:
 - ☐ Garage Tick if yes
 - ☐ Basement Tick if yes
 - ☐ Swimming Pool Tick if yes
 - ☐ Yard or Outdoor Space Tick if yes
 - ☐ Special Amenities
- ☐ Timeline and Availability:
 - ☐ Desired Move-in Date
 - ☐ Flexibility in Move-in Date
 - ☐ Availability for Property Tours
- ☐ Additional Requirements Any Specific Requirements or Preferences Not Mentioned Above
- ☐ Documentation:
 - ☐ Buyer's Identification
 - ☐ Proof of Funds

- ☐ **Mortgage Pre-approval Letter**
- ☐ **Property Addresses of Interest** List of Properties with Addresses that the Buyer is Interested In
- ☐ **Notes and Comments** Any Additional Comments or Questions from the Buyer
- ☐ **Agreement Acknowledgment** Acknowledgment of Buyer's Understanding of the Process and Agreement with Agent's Services