Real Estate Agent Checklist for New Buyers

Created: 1/17/2024

# Tasks:

☐ **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*