

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