

# 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