

Buyer Questions



Instructions:

1. Answer the questions with your significant other. (Not buying together? Skip to #3.)
2. Discuss, deliberate, have a brief existential crisis, question your place in the world and everything, then calmly come to an agreement. No seriously: You're going to disagree about some things. This worksheet is a chance to talk those differences out.
3. Take these answers to your Oaktree Realtors real estate agent, who will be overjoyed you aren't a hot mess!

Remember: There are no right answers. Only your answers.

Section #1 | Hopes and Dreams

Objective: Acknowledge your underlying reasons for wanting to buy a home.

Why are you buying a home?

Check all that apply. If there's one reason you feel speaks especially to you, circle it with some hearts. Y'know. If you want.

- | | | |
|---|--|--|
| <input type="checkbox"/> Because I've always wanted to own a home | <input type="checkbox"/> Because I'm getting married / we want a place to raise a family | <input type="checkbox"/> Because we need a bigger place |
| <input type="checkbox"/> For the tax benefits | <input type="checkbox"/> To get into a good school district | <input type="checkbox"/> To rent it out / extra income |
| <input type="checkbox"/> Sick of my rent going up | <input type="checkbox"/> To build a nest egg for retirement | <input type="checkbox"/> For the ability to update / design how I wish |

Any other reasons?

In your own words, what's the most important thing to you about owning a home?

The feeling of accomplishment? The yard? Entertaining? The garage? The extra bedroom for the in-laws?

How would you describe the right neighborhood for you right now?

Quiet? Bustling? Filled with lots of same-age families?

Section #2 | The Property

Objective: Get a handle on your knowledge and assumptions about what you want in a home. **Which of these most closely resembles the house you’re looking for?**

- ☐ Ranch (one level w/basement)
- ☐ Split Entry Style
- ☐ Two-Story Style
- ☐ Patio Home (no basement)
- ☐ Modern
- ☐ Other?

Describe the ideal house you want to buy.
Someplace with a two-car garage? Someplace that will increase in value quickly?

Which neighborhoods are you interested in?
Rank in order of preference.

1

2

3

4

5

6

Do you have any must-haves?
Rank in order of preference.

1

2

3

4

5

6

Most important room or specialty room?
Rec room? Formal dining room? Work out room?

Anything Else?

Which of the following features do you want?

Number of Bedrooms: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ _____

Number of Bathrooms: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ _____

Approximate Square Footage: _____

Indicate your preference for each feature below.

	Want	Need	Not important
Fireplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dedicated parking or garage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deck	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Central air	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fenced-in yard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Porch/sunroom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pool	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Garden	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hardwood floors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open concept	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stone countertops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Light-filled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lots of storage space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walkable neighborhood	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Close to parks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Close to pool	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Close to public transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other wants/needs/features?

Section #3 | Finances

Have you been pre-approved for a mortgage yet?
Pre-Approval shows your agent and the home sellers that you're serious!

☐ Yes, I have been pre-approved

☐ No, I haven't been pre-approved

☐ I need some help understanding pre-approval

Section #4 | Your Outlook

Objective: Help your agent know how you're feeling, what you're confident about, and where you could use a little bit of help.

Which parts of the buying process are you particularly excited or nervous about?
Only the unbalanced are excited about the mortgage process. Just sayin'.

	Nervous	Neutral	Excited
Research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working with an agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shopping online for homes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Getting a loan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open houses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Making an offer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Moving in	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>