

Viral Status:

Name: _____
Address: _____
Phone: _____
Email: _____

Current Situation:

Own: or Rent:

Where: _____
How are you thinking of spending?: _____
When did you move there?: _____
How many people in your family?: _____
Pets?: _____

What they want to do:

Own: Sell: Rent:

How much do you want to spend?: _____
Do you need to sell before you buy?: _____
Have you been prequalified for a mortgage?: _____
What is your time frame?: _____
Have you seen anything yet?: _____
Have you spoken with a broker?: _____
Have you identified the area?: _____

Suburban:

The type of home?: _____
How many bedrooms?: _____
Bathrooms?: _____
Approximate square footage: _____
Approximate acreage: _____
Must have features: _____
Would like to have features: _____
The dream features: _____
Have you considered: _____
Commute? _____
Schools? _____

Identity of neighborhoods? _____
What type of cultural things are you looking for? _____
When are you available to look? _____
Who will be looking? _____



Urban/NYC:

A brief dialogue about condo vs. co-op.

Are you looking at co-op: Are you looking at condos:

If co-op, then a few statements about qualifying for a co-op

Have you identified a neighborhood, if so why? _____

When are you available to look? _____

Who will be looking? _____

If selling:

Why are you thinking of selling now? _____

When did you buy your home? _____

What did you pay for it? _____

Where will you be going? _____

Have you spoken with a broker yet? _____

The process of choosing the “right” broker to sell your home

Introduce “the smart broker selling process”

If renting:

How the rental process works in NYC

Qualifying for a rental

How many bedrooms? _____

How many bathrooms? _____

Neighborhoods? _____

Pets? _____