Buyer Consultation Worksheet

Fill this in with your buyer during the first meeting. It keeps the conversation on their goals, numbers and timeline.

BUYER NAME(S) _____ PHONE _____ EMAIL _____

TARGET MOVE-IN DATE _____ WHY NOW? (job, family, lease end) _____

1. Budget (use their real numbers, not guesses)

Comfortable monthly payment (all-in): _____

Cash available for down payment and closing costs: _____

Lender contacted? Pre-approval amount: _____

Other monthly debts the lender will count: _____

2. Must-haves and nice-to-haves

Must-haves (3 max): _____

Nice-to-haves: _____

Deal-breakers: _____

Preferred areas, schools or commute: _____

3. Timeline and risk

- ☐ Lease or home sale that has to line up with the purchase
- ☐ Needs to sell a current home first
- ☐ Waiting on a bonus, gift funds or credit improvements
- ☐ Flexible: will wait for the right home

4. Questions to ask before you leave

What would make this the wrong move for you? _____

Who else is part of the decision? _____

How do you like to be contacted, and how often? _____

Marketing form, not legal or financial advice. Use your brokerage's required forms and follow fair housing and your state's agency rules.

After the Consultation: Next Steps

Send these within 24 hours so the meeting turns into momentum.

Same-day follow-up checklist

- [ ] Text or email a thank-you with the next step and a date
- [ ] Send the lender introduction if they have no pre-approval
- [ ] Set up a saved search with their must-haves and areas
- [ ] Add them to your CRM with budget, timeline and deal-breakers
- [ ] Calendar a check-in call for 3 days from now
- [ ] Send a short written summary of what you heard

Three tour-day rules to agree on

1. How many homes per tour: _____
2. Who attends, and who has final say: _____
3. How fast we move on a home they love: _____

Fair housing reminder

Base searches and advice on the buyer's stated criteria: price, size, features and location they ask for. Do not steer toward or away from neighborhoods based on protected classes. When in doubt, share the facts and let the buyer decide.

Notes

From AgentNexo (agentnexo.club). Free to print and use with your own clients.