

Buyer's Workbook

COMPASS



Heather
Whittall
Homes



Delivering a modern
real estate experience
from coast to coast.

COMPASS

[compass.com](https://www.compass.com)

Things To Do Before,
During And After You Move

Buyer Questionnaire



First, we'll need to know the basics

1. Legal name

2. Email address

3. Best phone number to reach you

4. Current mailing address

5. Was there someone who referred you to me?

6. Which of these best describes you?
- a. I am a first-time homebuyer
 - b. I am looking to downsize
 - c. I am looking for a larger home
 - d. I have previously owned a home but do not at the moment
 - e. Other:

Let's discuss your current home

7. What is the ownership status of your current home?

- a. I'm renting my home
- b. I own my home
- c. I am living with a family member
- d. Other:

8. If renting, when does your lease expire?
Is there flexibility in your move out date?

9. If you own your home, do you need to sell it before closing on your next home?

10. If there is a gap between your current and next home, do you have a temporary place to stay? (short term rental, with a family member/friend, hotel)

Let's discuss your next home

11. What is your timeline for finding your next home?

- a. Immediately
- b. Within 1 month
- c. Within the next 3 months
- d. Within the next 6 months
- e. Within the next year

12. Will you be the sole purchaser OR is someone else involved in the financial and/or decision making process? If yes, what is that person's name?

13. What property are you looking for?

- a. Primary Residence
- b. Second/Vacation Home
- c. Investment Property

14. What type of property are you looking for?

- a. Single-family home
- b. Condo/co-op
- c. Apartment
- d. Other:

15. How many bedrooms are you looking for?

- a. Studio/None
- b. 1 Bedrooms
- c. 2 Bedrooms
- d. 3 Bedrooms
- e. 4 Bedrooms
- f. 5+ Bedrooms

Buyer Questionnaire



16. How many bathrooms are you looking for?

- a. 1 full bathroom
- b. 1 full, 1 half bathrooms
- c. 2 full bathrooms
- d. 2 full, 1 half bathrooms
- e. 3 or more bathrooms

17. What property condition(s) are you comfortable purchasing?

- a. New construction
- b. Move-in ready
- c. Light/cosmetic updating
- d. Shell/rehab condition

18. Are there any other important aspects of your life your future home or property should support?

19. Are there any specific neighborhoods you are interested in exploring?

Almost done! Lastly, lets cover some financial questions.

20. Have you already been pre-approved for a mortgage? If so, by which company?

21. How much would you be comfortable paying monthly? (with taxes, mortgage, insurance)

22. What price range are you looking in?

23. How much of a down payment are you considering?

24. Do you have any up-front budget/ financial concerns?

25. Finally, are there any other questions or concerns you would like to discuss when we meet?

My Dream Home Wish List

Start your search on [compass.com](https://www.compass.com) by filtering for the amenities that are important to you in your next home.



Features

- | | | | |
|--------------------------|-----------------|--------------------------|---------------------|
| <input type="checkbox"/> | Bedrooms | <input type="checkbox"/> | Home office |
| <input type="checkbox"/> | Bathrooms | <input type="checkbox"/> | Elevator |
| <input type="checkbox"/> | Outdoor Space | <input type="checkbox"/> | Full service |
| <input type="checkbox"/> | Pet Friendly | <input type="checkbox"/> | Gym |
| <input type="checkbox"/> | Parking | <input type="checkbox"/> | New Construction |
| <input type="checkbox"/> | Minimum Sq. Ft. | <input type="checkbox"/> | Move-in Ready |
| <input type="checkbox"/> | Maximum Price | <input type="checkbox"/> | I'll do my own work |

Condo

Single Family

Townhouse

Location



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