

Home Buyer Consultation Checklist

1. Pre-Consultation Prep

	Item
Gather basic lead info (names, contact details, etc)	<input type="checkbox"/>
Verify how they found you (referral source/marketing channel)	<input type="checkbox"/>
Send a welcome email with the meeting agenda.	<input type="checkbox"/>
Confirm meeting format (in-person, video, phone) and length	<input type="checkbox"/>

2. Buyer Profile & Motivation

- ☐ **Primary goal** (first home, upsizing, downsizing, investment, relocation)
- ☐ **Desired move-in timeline** and flexibility
- ☐ **Current living situation** (renting, owning, lease end date)
- ☐ **Decision-makers** and their roles
- ☐ **Lifestyle factors** (commute, schools, walkability, pets, hobbies)

3. Financial Snapshot

- ☐ Verified lender pre-approval or proof of funds
- ☐ Comfortable monthly payment range vs. maximum qualification
- ☐ Cash available for down payment, closing costs, reserves
- ☐ Financing type (conventional, FHA, VA, USDA, jumbo, cash)
- ☐ Discuss interest-rate environment & locking strategy
- ☐ Expected out-of-pocket expenses ([inspection](#), appraisal, insurance, HOA fees)

4. Must-Have / Nice-to-Have Real Estate Criteria

Category	Must-Have	Nice-to-Have
	<input type="checkbox"/>	<input type="checkbox"/>
Location/Neighborhoods	<input type="checkbox"/>	<input type="checkbox"/>
Property type, home criteria, & style	<input type="checkbox"/>	<input type="checkbox"/>
Beds/Baths & square footage	<input type="checkbox"/>	<input type="checkbox"/>
Yard/Outdoor space	<input type="checkbox"/>	<input type="checkbox"/>

Parking/Garage	<input type="checkbox"/>	<input type="checkbox"/>
Age/Condition (turn-key vs. fixer)	<input type="checkbox"/>	<input type="checkbox"/>
Special features (home office, EV charger, accessibility)	<input type="checkbox"/>	<input type="checkbox"/>

5. Market Education

- ☐ Current inventory levels & days-on-market trends
- ☐ Recent comparable sales examples
- ☐ Typical list-to-sale price ratios
- ☐ Seasonality considerations
- ☐ Local disclosures or regulations buyers must sign (lead paint, radon, water rights, etc.)

6. The Buying Roadmap

1. ☐ Write & submit offers
2. ☐ Earnest money deposit procedures
3. ☐ [Inspection](#) & [due-diligence](#) timelines
4. ☐ Appraisal contingency basics
5. ☐ Financing & underwriting milestones
6. ☐ Title work & closing disclosures
7. ☐ Final walk-through and closing day logistics
8. ☐ Post-closing support (utilities, homestead filing, warranty)

7. Representation & Paperwork

- ☐ Agency relationship explained; brokerage disclosure signed
- ☐ Exclusive buyer-broker agreement reviewed & executed (if used in your state)
- ☐ Sample purchase contract overview
- ☐ Data-privacy and communication preferences agreed upon

8. Next Steps & Action Items

Who	Task	Deadline
Buyer	Send lender pre-approval	_____
Agent	Set up MLS search/portal	_____
Buyer	Rank top neighborhoods	_____
Agent	Schedule first touring block	_____

9. Resources to Provide

- Home-buying guide PDF
- Sample closing settlement statement
- Recommended lender / inspector / insurance list
- [Cost-of-homeownership worksheet](#)
- FAQ sheet on earnest money & [contingencies](#)

10. Follow-Up Plan

- ☐ Add buyer to CRM with tagged search criteria
- ☐ Schedule weekly check-in (call or email) until under contract
- ☐ Automate new-listing alerts and market updates
- ☐ Calendar reminder for rate-lock discussion two weeks before projected closing