

Agent /Phone# E mail

Buyer Name/Phone# E mail

Thank You for the Referral-- I'll begin following up asap!

Hello Agent!

In the meantime "in an effort to cut to the chase" andso you don't waste time with someone not in a position to buy ("Buyers are Liars") we will need to compare notes!

After you have read the following please let's talk and put this deal together!!!

Is there any additional info you can provide?

Is it for their primary residence or investment property?

The buyers desired geographical locations (cities)_____

The price or payment range they desire? \$_____

Do they own a home now (Y /N) Are they selling it? (Y /N)

Renting? (Y /N) Living w/relatives? (Y /N)Co signer?

Did they mention or ask questions about credit issues? (Y /N)

How much they have for downpayment?_____Gift \$ (Y /N)

Do they have a recent copy of their credit report (Y /N)

Have they applied anywhere else? (Y /N) Why have they decided to cancel with that lender?_____ Will that lender send up the credit report and other documentation?

Anything else you can tell us that will help determine if your potential client "is a live one"?