



Stacia Weishaar's Client Intake Form



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Tell me about where you live and where you're hoping to move to

What type of home are you looking to buy? I have clients who sell houses too so if I hear of something that would be a good fit for you I would let your Agent know (# of beds/baths, square footage, lot size, view, etc.)

Do you have children? Pets? Who else will be moving with you?

Ask your standard prequal questions (income, assets, debt, credit, etc.)

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What concerns you about the homebuying process?

How was purchasing your last home? (if applicable)

What is it about buying a home that is so important to you?

Thank the client for providing such valuable information to help you better serve them. Then transition to sharing the following with them:

- Your 'Why', How and What you Do
- Your Team's Process and Flow
- How you will communicate with them throughout the process
- What to expect - Set Expectations!