



Client Profile

Date: _____ Realtor: _____
 Contact: _____

I. Contact Information

Name(s): _____
 Name(s): _____

Address	City, State, Zip
Address	City, State, Zip

Work	Home	Cell
Work	Home	Cell
Fax	Email	
Fax	Email	

Preferred Contact Method				Time	
Work	Home	Cell	Email	AM	PM
Work	Home	Cell	Email	AM	PM

II. Housing Details

Real Estate Interest	Time Line
Sell Buy Rent Lease Purchase	Today 30-90 Days 90-120 Days 6- 12 Months Over a Year
Type of Property	Price Range
SF 2-4 Units Condo/Townhome Apartment Land Commercial	\$ \$
Primary Residence Second Home Rental Investment Rehab	Age of Home: New Construction
Location/Area	Preferred Style
City: Zip Code: School District:	
Stories: # Bedrooms: # Baths: Garage: # of Cars: Basement: Fireplace Fenced Yard	Other Amenities and Comments:

Disclosure: I agree to: Provide equal professional service without regard to the race, color, religion, sex, handicap, familial status, or national origin of any prospective client, customer, or of the residents of any community.

Planning for Your Home	
Paying Cash Mortgage Refinance Rehab Loan Home Equity Downpayment Assistance Need Seller Concessions Other:	Have you recently ordered a copy of your Credit Report? Have you talked with a Mortgage Planner? Have you talked with a Housing Counselor? Have you completed a loan application? Have you applied online?
Current Mortgage Company	Loan Type
Loan Officer: Contact Info: Pre-qualification DU Approved Comments:	FHA VA Conventional USDA NSP Other: Downpayment Assistance Program Type Your desired mortgage payment range:
Do you have your downpayment? Yes No If yes, is it a gift? Are you paying the closing cost? Is the home served by a well or septic tank? Yes No Is there a home warranty? Any inspections on the property Closing Date: Closing Attorney:	Do you have a home to sell or rent? When does your rent contract expire? Are you self-employed? Yes No
Property Address: Purchase Price: Single Family 2-4 Unit Condo Townhome	HOA/Condo Fees: \$ monthly/annual Does the property need repairs? Yes No What type of repairs?
Refinance	
Current Lender: Current Payoff: 1 st Mortgage \$ 2 nd Mortgage \$ Any other liens on property? Yes No If yes, explain: Are the property taxes up-to-date? Annual taxes: \$ Is the Hazard Insurance up-to-date? Yes No If no, explain: Is flood insurance required: Yes No Does the home need any repairs, corrections or updating? Yes No If yes, please explain" Is your home served by a well or septic tank?	
Current or Previous Problems with Depression?	Current or Previous Problems with Alcohol or Drugs?

Any Family History of the Above?	
Quality of Relationships with Family and Friends? _____ Poor _____ Fair _____ Good _____ Excellent	
Describe Your Workspace	Any Sleep Problems?
Describe Your To-Do List or Number of Projects in Process	
Are You Always On Time or Always Late?	
Are You Impulsive? When?	
Have You Worked with a Counselor/Therapist?	
How Do You Like to Learn? (visual – see the picture or color, tactile - touch, auditory - hear, verbal – speak out loud and free-associate, kinesthetic – moving and doing, cerebral – think about the big picture and make sense of the puzzle)	
Top 5 strengths (Strengths finders 2.0)	Learning style
Favorite Color	Favorite Flower
Favorite Fragrance	Astrological Sign
Favorite Candy/Sweet/Food	
Favorite Restaurant or Type of Cuisine	
Favorite Cartoon or TV Character	
Favorite Type of Music/Artist	
Favorite Spot or Location	
Favorite Charity	

Hobbies/Sports You Enjoy/Play
Consistent Exercise? What kind(s)? How often? What kind do you most enjoy? How do you make exercise enjoyable?
Do you Have an Animal Mascot/Spirit Guide/Association
What Do You Do for Fun
Do You Like to Read? If so, What? How often do you read?
Do you like to write or journal? How often do you actually write?
What's Your Favorite Toy Store?
What's the Most Thoughtful and/or Appreciated Gift You've Ever Received?
How Do You Treat Yourself Special?
What Sort of Stores Do You Enjoy Getting Gift Certificates To?
What Do You Enjoy Collecting?
What's Your Idea of the Perfect Mini-Vacation?
You Know You're Loved When