



BUYER LEAD SHEET

Sales Agent		Date		Entered in CRM		Set Up Drip/Follow Up	
CONTACT INFORMATION				LEAD INFORMATION			
Full Name				Owner		Assigned	
Spouse				Personal/Company			
Mobile				Marketing Channel			
Email				Lead Source			
Language				Lead Status			
ABOUT PURCHASE				BUYING INFORMATION			
Are you currently working with an agent?				What is an affordable monthly payment?		\$	
Are you in a lease? Y/N				What is your estimated purchase price?		\$	
If yes, when is your lease up? 00/00/0000				Saved for a down payment?		\$	
If no, do you currently own a home? Y/N				Family to help with a down payment? Y/M/N			
If yes, do you need to sell before you buy? Y/N				Estimated Credit Score? (B/CB)			
How will this property be used?				<i>(720, 680-719, 640-679, 620-639, 580-619, Below 580)</i>			
<i>(Primary Home, Second Home, Rental Property)</i>				Bankruptcy or Foreclosure in the last 7 years?			
Have you already found a property to purchase?				<i>(No, Bankruptcy, Foreclosure, Both)</i>			
If yes, what is the property address?				Mthly payment for debts on Credit Report?		\$	
				Is there anyone else on the loan? Y/N			
What is your timeframe for buying?				If yes, who?			
<i>(ASAP, Not Quite Ready 2-3 month, In the Future 6-12 Months, Not Sure)</i>				Anyone applying served in the military? Y/N			
PROPERTY INFORMATION				Do all borrower have a two year work history? Y/N			
What areas would you like to live?				Gross Monthly Income		\$	
				LOAN OFFICER INFORMATION			
Type of Property				Loan Officer			
<i>(Single Family, Townhome, Condo, Land, Duplex, 4 Plex, Investment)</i>				Live Transfer to Loan Officer? Y/N			
How Many bedrooms?		How many bathrooms?		Estimated Approval Amount		\$	
Minimum square footage for the home?				APPOINTMENT INFORMATION			
Would you like a carport/garage?				Appointment Purpose:			
Do you prefer a move in ready/fixer upper?				<i>(Needs Meeting, Showing Homes, Listing Presentation, Drop By)</i>			
Stay within a specific school district? Y/N				Location			
If yes, what school district?				Best Time		Best Date	
Note:							