

HOMEBUYER WORKSHEET

Name:



MONTEZUMA

REAL ESTATE COMPANY

CORTEZ, CO

THE ULTIMATE

“I Wanna Buy A House!”

CHECKLIST

Instructions:

1. Answer the questions with your partner if applicable. (Not buying together? Skip to #3.)
2. Discuss, deliberate, have an intentional conversation, then calmly come to an agreement. No seriously: You're going to disagree about some things. This worksheet is a chance to talk those differences out.
3. Take these answers to your real estate agent!

Remember: There are no right answers. Only your answers.

Section #1 | Hopes and Dreams

Objective: Acknowledge your underlying reasons for wanting to buy a home.

Why are you buying a home?

Check all that apply.

- | | | |
|---|--|--|
| <input type="checkbox"/> Because I've always wanted to own a home | <input type="checkbox"/> Because I'm getting married / we want a place to raise a family | <input type="checkbox"/> Because we need a bigger place |
| <input type="checkbox"/> For the tax benefits | <input type="checkbox"/> To get into a good school district | <input type="checkbox"/> To rent it out / extra income |
| <input type="checkbox"/> Sick of my rent going up | <input type="checkbox"/> To build a nest egg for retirement | <input type="checkbox"/> For the ability to update / design how I wish |

Any other reasons?

In your own words, what's the most important thing to you about owning a home?

The feeling of accomplishment? The yard? Entertaining? The garage? The extra bedroom for the in-laws?

How would you describe the right neighborhood for you right now?

Quiet? Bustling? Filled with lots of same-age families?



Section #2 | Your Support Network

Objective: Set your expectations for your friends, family, and any expert partners (agents, lawyers, etc.) you may work with along the way.

Name specific friends, family, and expert partners who will fill these roles.

Co-Buyer Will anybody be buying or co-signing with you? Your significant other? Your parents?	Adviser Who will be guiding you along the way?	Co-Shopper Who will be helping you pick the right place?	Emotional/Texting Support Who will always be there when you need them?

Section #3 | The Property

Objective: Get a handle on your knowledge and assumptions about what you want in a home.

Which of these most closely resembles the house you're looking for?



Craftsman



Modern



Victorian



Townhouse/condo



Split level



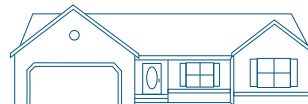
Colonial



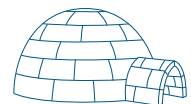
Tudor



Cape Cod



Ranch



Other?

Describe the ideal house you want to buy.

Someplace with a two-car garage? Someplace that will increase in value quickly?

Which areas are you interested in?

Rank in order of preference.

1 _____

2 _____

3 _____

4 _____

5 _____

6 _____

Do you have any must-haves?

Rank in order of preference.

1 _____

2 _____

3 _____

4 _____

5 _____

6 _____

Which of the following features do you want?

Number of Bedrooms: 1 2 3 4 _____

Number of Bathrooms: 1 2 3 4 _____

Approximate Square Footage: _____

Indicate your preference for each feature below.

	Want	Need	Not important
Fireplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dedicated parking or garage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deck	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Central air	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fenced-in yard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Porch/sunroom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shop	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Garden	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hardwood floors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open concept	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stone countertops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Light-filled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lots of storage space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walkable neighborhood	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Close to parks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Close to pool	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Close to public trail systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Most important room or specialty room?

Rec room? Formal dining room? Work out room?

Anything else?

Section #4 | Finances

Objective: Get a handle on your financial situation.

How much do you currently spend on housing each month?

How much more or less do you want to spend once you buy?

How much of your monthly income are you planning to spend on your home?

Slightly important question.

- All of it. No, seriously. All of it.
- Most of it. As long as I have money left over for vacations and Netflix.
- Some of it. My home isn't the end-all-be-all of my life.
- A little of it. It's just a place to sleep.

How's your credit?

Better credit is better for you. But don't worry – there are options even if your credit isn't perfect.

- Exceptional
800+
- Very Good
740 to 799
- Good
670 to 739
- Below Average
580 to 669
- Poor
579 and lower

Have you been pre-approved for a mortgage yet?

Pre-approval shows your agent and the home sellers that you're serious!

- Yes, I have been pre-approved.
- No, I haven't been pre-approved.
- I need some help understanding pre-approval.



Section #5 | Your Outlook

Objective: Help your agent know how you're feeling, what you're confident about, and where you could use a little bit of help.

Which parts of the buying process are you particularly excited or nervous about?

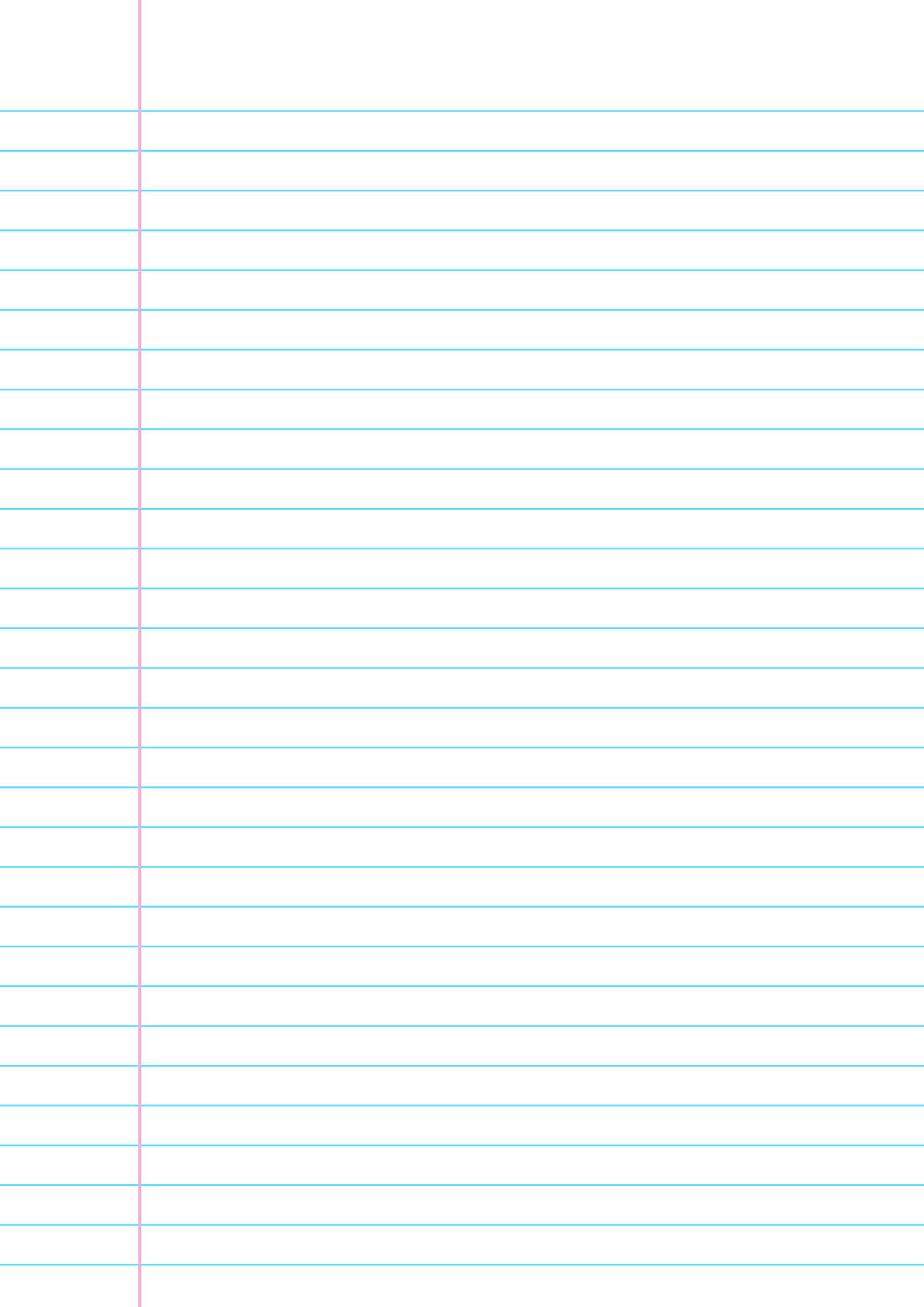
Only the unbalanced are excited about the mortgage process. Just sayin'.

	Nervous	Neutral	Excited
Research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working with an agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shopping online for homes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Getting a loan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Going to Showings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Making an offer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Moving in	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

And we're done!

Now that you have a handle on what you're looking for and what you expect, we can start looking for the right home and fit for you!





Montezuma Real Estate Co

Homebuyer Worksheet and Notes

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