

# CUSTOMER QUESTIONNAIRE



Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

- a. In what stage of the process are you? For example, have you been looking online or have you been out to see homes in person? \_\_\_\_\_
- b. Have you already been pre-approved by another lender? \_\_\_\_\_
- c. What type of home do you desire? Condo, townhome, single-family detached, etc. \_\_\_\_\_
- d. In which area(s) do you hope to purchase a home? \_\_\_\_\_
- e. What is your time frame for purchasing? For example, one month, six months, etc. \_\_\_\_\_
- f. What is your target price point for a new home? \_\_\_\_\_
- g. How much would you like to put down? \_\_\_\_\_
- h. Will any of the down payment be coming from a gift? If so, how much? \_\_\_\_\_
- i. What is your target monthly payment amount? This amount would be your desired "all-in" payment, including principal, interest, taxes, insurance and homeowners association dues. \_\_\_\_\_
- j. Who can we thank for referring you to our team? \_\_\_\_\_
- k. Have you ever owned a home? \_\_\_\_\_
- l. Do you know your credit score? If so, please list it here. \_\_\_\_\_
- m. What is most important to you in selecting your mortgage lender? \_\_\_\_\_



**Have questions? Don't hesitate to reach out!**



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