

Dream Home Wishlist

Name _____ Phone _____ Email _____

Current home address _____

What is your current living situation? _____

Spouse full legal name (if applicable) _____

Spouse email _____ Spouse phone _____

What is your motivation for a new home?

Type of property you're interested in?

- Condo Single-family Triplex or Quadplex Second home
 Townhouse Duplex Investment property

What cities are you interested in?

What price range would you like to consider?

Minimum _____ Maximum _____

Are you open to/want to consider new construction? Yes No Unsure

You are looking to move...

- Immediately Within 3 months Within 6 months Within 12 months

What 5 things would make you HAVE to write an offer?

1. _____
2. _____
3. _____
4. _____
5. _____

What is your motivation level to get into a new place?

-
- 1 2 3 4 5 6 7 8 9 10

Let's define success. What are your top 3 expectations for your real estate agent?

What would exceed your expectations and ensure that you are thrilled?

How did you find us?

Dream Home Wishlist

Desired square footage

Minimum _____ Maximum _____

Bedrooms _____

Bathrooms _____

Garage spaces _____

Kitchen Appliances

Electric Gas Either

Heating

Electric Gas Hot water

INTERIOR

Must Have Would Like Not Important

One Story	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Two Story	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open Floor Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wood Floors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Formal Dining Room	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Formal Living Room	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Office/Den	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Laundry Room	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finished Basement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fire Place	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

EXTERIOR

Must Have Would Like Not Important

Attached Garage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional Parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Swimming Pool	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hot Tub	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sauna	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patio/Deck	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Landscaping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fenced Yard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1+ acres	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Waterfront	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Waterview	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Golf Course	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Senior Living Community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

NOTES

Buyer Checklist

- Complete a buyer consultation with your agent
 - Complete "Dream Home Wishlist"

- Get pre-approved
 - Provide your lender all documentation required to obtain a pre-approval
 - Share your budget with your agent and adjust house search parameters accordingly

- Agent set up auto-search on the MLS
 - Double check parameters are accurate

- Start looking at exclusive listings
 - Set up account on ZenList
 - Notify your agent of any homes that interest you

- Check out new construction inventory
 - Make sure your agent is present at any meetings or tours

- View existing properties with your agent
 - Keep in mind what can be changed and what can't be changed
 - If you can't picture your life in the home, move on to the next

- Weekly buyer meeting
 - Adjust inventory searches if needed
 - Set the next appointment at each meeting



Buyer's Advantage Program

OUR EXCLUSIVE SERVICES

1. **I will assist you in finding a lender** to secure financing appropriate to your specific situation (you may use whomever you like).
2. **I will search on-market and off-market inventory** to find a home that matches your buying criteria. **I will notify you of any properties I find.**
3. **I will arrange private showings** of any property, including new construction, at your convenience.
4. **I will prepare strategic offers** based on our discussions about your goals and financial situation. I will present the offer on your behalf and negotiate in your best interests to help you secure the property at the best price and with the best terms possible.
5. **I will recommend trusted and vetted vendors** along the way such as home inspectors, title companies, homeowner's insurance, etc.

OUR EXCLUSIVE GUARANTEES (TERMS AND CONDITIONS APPLY)

Love it or List it: During the first 12 months after your closing, if you are dissatisfied with your new home purchase for any reason, simply let us know and we will sell it for you with no listing agent commission.

No-Strings Cancellation: If you are not completely satisfied with the job we are doing for you, this contract and the Buyer's Representation Agreement may be canceled at any time by either party with 3 days' written notice at no additional cost to you.

PROGRAM CONDITIONS

1. You agree to inform all other agents, unrepresented sellers, and new construction reps that you are under agent representation with me. You also agree to only visit any new construction inventory with me or my showing partner.
2. You have the right to cancel this agreement, without penalty, up to the time we present an offer on your behalf. Should you want to cancel, you agree to do so in writing with 72 hours' notice, and we reserve the right to attempt to remedy the situation. If an agreement cannot be reached, you will be released from our agreement, except as to homes we have already shown you, for which our agreement will stay in place.
3. If the Love It or List It Guarantee is used, you agree to purchase your new home with Pemberton Homes as your buyer agent. This guarantee is only in reference to the fees charged by Pemberton Homes. It does not cover, include, or refer to charges by other parties, such as listing photography, buyer's agent commission, closing costs, etc. You and Pemberton Homes must sign a listing agreement for 6 months and have an agreed-upon listing price. If an offer is submitted at or above the list price and you reject it, this agreement is null and void. This guarantee is offered to you only on the condition you purchase another home of equal or greater value within 6 months of completing the sale of your current home.

Buyer: _____

Date: _____

Buyer: _____

Date: _____

Agent: _____

Date: _____

OFFER CHECKLIST

Client Name: _____

Property Address: _____

REQUIRED DOCUMENTS FOR FULL OFFER:

- Agency and Relationships in Real Estate Disclosure
- eXp and PHT Affiliated Businesses Disclosure
- Buyer Representation Contract
- Compensation Disclosure to Buyer
- Earnest Money Receipt
- Purchase Agreement
- Arbitration Disclosure
- Personal Property Disclosure
- CIC Documents (if needed)
- Well and Septic Disclosure (if needed)
- Sellers Disclosure/Disclosure Alternative
- Any other disclosures or addenda/amendments

Required Information for Full Offer:

Purchase Price: _____

Earnest Money: _____

Financing Type: _____

Downpayment: _____

Closing Date: _____

Inspection Contingency: _____

Home Warranty: _____

Seller Contributions: _____

Other Terms: _____

OFFER EMAIL CHECKLIST

DOCUMENTS TO SEND TO LISTING AGENT:

- Pre-approval Letter (Property Specific)
- Signed Purchase Agreement
- Seller's Disclosure/Disclosure Alternative
- Arbitration Disclosure
- Personal Property Disclosure
- CIC Documents
- Well and Septic Disclosure
- Any other disclosures or addenda/amendments

EXAMPLE EMAIL:

Hello again, Sue!

Thank you and your sellers for presenting such a lovely property! My buyers absolutely love the unique floorplan and fantastic backyard that this home offers. They are very excited to present your sellers with this offer.

These buyers are incredibly qualified and ready to roll. They're pre-approved (see attached) with my preferred lender, Colin Smith with FLEX Mortgage, with whom I have successfully closed countless transactions. Should you have any questions or concerns about my clients' financing, please feel free to reach out to Colin directly (CC'd here).

Without further ado, here are the highlights of the offer:

Purchase Price: \$410,000

Earnest Money: \$4100

Financing: Conventional, 20% down, 30 year fixed

Inspection: 7 day, contingent, no repair requests

No seller contributions

Closing date: August 22nd (Flexible)

Hopefully this offer fits what your sellers are looking for. If there is anything missing that the seller would like to see, please let me know. Otherwise, I look forward to hearing from you!

Please confirm receipt.

REMINDERS:

- Always call the listing agent before sending the offer.
- CC the lender to the email.
- If a term needs more explanation, either add it to the email to help the listing agent remember.