



## Section 1: Contact Information

Please provide us with some basic contact information so we know how to reach you.

\* = Mandatory Fields

* First Name:	* Last Name:	* How did you hear about us?		
* Email:	* Phone Number:	* Occupation:		
* Address:	* City:	* Province:	* Country:	* Postal Code:
* Is this a home or cell phone number? (Home/Cellphone)				

## Section 2: Other Parties Involved in the Decision

Please tell us a bit more about your spouse, family, or anyone else who may be a decision-maker in your upcoming real estate purchase.

Spouse/Partner Name (if applicable):	
Spouse/Partners Email Address (if applicable and you wish to include it):	
Spouse/Partners Phone Number:	Spouse/Partners Occupation:
Who should we use as our main contact?	
Childrens Names and ages	Pets:

## Section 3: Your Investment experience & Investment Goals

\* Why Am I Investing?:

Might seem like a basic question, but you really need to be able to fully answer why you're real estate investing before you do. Are you doing it for an income? Or are you looking appreciation? Are you planning on using the property yourself? Or a combination perhaps? There's potential for all of those objectives in real estate investing, but it's important to decide why you're investing beforehand because there's often a trade-off. For example, you might be able to earn income from a property that may increase in value with time, but your ability to use it may be limited if you would like to enjoy its rental tax benefits.

\* What kind of investment do I want?:

Depending on why you want to invest, decide on what kind of investment you want to make. There are tons of different types of real estate investing. You can use the property for traditional investing, Airbnb, or flipping homes. These options tend to be more hands-on and require more activity from you. On the other hand, you can choose crowdfunding or a real estate investment fund (REIT), which tends to require less time and is more of passive investment. So, decide on what kind of investment you want before jumping in.

\* Am I in it for the long run?:

Or do you just want to be on the sidelines? Many people who think of real estate investing as merely a hobby or an easy retirement plan failed to handle the responsibilities of the job. Unlike buying stocks and bonds, real estate investing is a long commitment. But depending on whether you want to make this a full time or not, you can also better decide on what time of real estate investment you'd like make. If you're not in for the long run, you might want to consider a more passive real estate investing options, like lending other investors money to flip properties. But, make sure you're able to dedicate the time needed, so you can truly benefit from your investment.

\* How will you finance your property?:

There are so many options out there on how to finance your real estate investment property. From cash, to loans, to using a private lender... Assess your financial status and decide how you will finance a your property before real estate investing

\* How long are you willing to wait for a return?:

Unlike trading stocks or buying mutual funds, real estate investing doesn't make you rich fast. You're most likely going to have to wait a while before seeing from returns real estate investing. For example, if you're going to opt for the crowdfunding options, it may take even up to 10 years before seeing returns! That is not say you won't make any, but you just have to be patient. Real estate investing can be quite profitable, but you just have to be willing to be patient.

\* What is my risk tolerance?:

There's an inherent risk with real estate investing. So, after you've answered all the questions above, check to see how much risk you're willing to take before diving in. For example, if you're going for traditional real estate investing, then you need to make sure you find the property that is rentable because there could be a risk of not getting tenants. With Airbnb, you need to make sure that you need to find a place where tourists and visitors will be there often. If you're flipping homes, the assumption is that you'll be able to sell the home at a high enough price that will cover its initial cost and give you a profit. So, just check with yourself to assess your risk tolerance.

\* If you will be occupying the property, what will your involvement be? I.e. nature of your business and spatial needs and long term goals of your personal occupancy.:

\* Have you discussed with a lender? ( Yes / No )

If yes, please provide their name, company and contact info.:

#### Section 4: Specific needs and wants

\* What makes you want to buy a property right now?:

\* What is your ideal time frame to make a purchase?:

\* What is the biggest factor in your decision to choose a property?:

\* Have any specific properties caught your eye? Please detail the links or MLS#.:

#### Section 5: Your Real Estate Professional

How Can we make this process as smooth as possible for you? Every transaction is completely unique. But knowing what you've experienced personally will help us make this as productive, efficient and stress free as possible for you.

\* Do you own any other income producing properties? ( Yes / No ):

\* What are the top three things you are looking for in a real estate team that you hire?:

\* What are your biggest concern regarding the selection and purchasing process?:

## Section 6: Dollars and cents. Let's talk about money...

\* = Mandatory Fields

Our goal is to help you get the answers you need to find the best most suitable property for you and be sure it fits in with the rest of your short and long range financial goals.

\* What is your minimum price?:

\* What is the absolute most you would consider spending if you found the perfect property?:

\* How much do you have set aside for downpayment and closing costs?:

\* Have you spoken with a lender to get pre approved and formulate a plan?:

If yes please list their name, company, number and email address:

Are you comfortable with the advice and guidance they have given you? Please let us know if you have any outstanding questions or concerns that we can help find the answers for you.:

If you have not begun the financing process would you like us to recommend a representative that will best suit your requirements?:

## It's time to meet our team!

It's time to meet our team! We are excited to get to meet you in order to develop the best strategic plan for your situation. Tell us a bit more about when that might be convenient

\* Our next step will be to set up a meeting with a team member at the office to discuss the best strategy to meet your goals.  
When do you typically prefer to meet?

\* Is there anything else you would like for us to know so that we can help you sell?