



VISION

REAL ESTATE

Picture Your Dream
Home Checklist

Narrowing your focus



Buyer Information

Buyer Name: _____

Cell: _____ Work: _____

Email: _____ Occupation: _____

I am best reached by: Cell phone call Email Text

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Cell: _____ Work: _____

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Have you bought or sold real estate before?

Yes No

If yes, can you share your overall buying experience and anything you'd like to see different:

Let's talk **numbers**:



1. Do you know your maximum purchase price? _____

2. Is this your:

First home

Size up

Investment

Downsize

3. Will this be a cash purchase? (No mortgage required), Yes No

If not, how much do you estimate you will have for a down payment?

_____ % of the purchase price or \$ _____ fixed amount.

4. Is your down payment coming from:

Sale of existing home

Current assets

Other

5. Have you been pre-approved for a mortgage? Yes No

6. If yes, how much have you been pre-approved for? \$ _____

7. Did your mortgage advisor lock in an interest rate for you? Yes No

8. If yes, what is the interest rate locked in at? _____ %

Location is everything



1. What community, neighbourhood, or street do you love? _____

2. If not sure, tell me what's most important to you (Check all that may apply):

A short commute to work: less than 30 minutes from _____

Close to transit, shopping, hospital, parks

Private/ravine backyard A large backyard Yard doesn't matter

Near a reputable high school (Name: _____)

Near a reputable primary school (Name: _____)

Near a private school (Name: _____)

What is your exposure preference from your front yard?

South

North

East (Sunrise)

West (Sunset)



Let's talk specifics of your home



What type, style and condition of a home are you ideally looking for?
(Check all that may apply.)

Type of Home

- Detached Semi-detached Condo Two-storey
- Undecided Bungalow Split-level
- Duplex Other Acreage/rural home

Style and Condition of the Home

- Open concept Formal living/dining Main floor primary bedroom ideal
- Fairly new < 5 years old Age doesn't matter but must be in good shape
- Fixer upper works Prefer an income property

How Many Bedrooms?

- 1 full Minimum 1.5 Minimum 2 full
- 3+ Must have primary ensuite

Garage & Parking

- Single garage Single driveway 1.5 garage No garage needed
- 2 car garage 3+ garage Parking not necessary
- Carport is okay Parking underground is a must - at least 1 space

Please rate your favourite features



Using a rating of 1, 2 or 3 as outlined below, rate each feature.

- 1. **HIGHEST** priority
- 2. **SOMEWHAT** of a priority but we could live without it
- 3. **BONUS** Feature "Well, that would be a nice feature to have."

_____ Main floor laundry room

_____ Primary ensuite

_____ Energy efficient - new windows,
_____ High-efficiency furnace, AC

_____ Woodburning fireplace

_____ Appliances included

_____ Gas fireplace

_____ Pool (in ground or above ground)

_____ Home office

_____ Definitely no pool

_____ Finished basement/in-law suite

_____ Walk out basement

_____ Lots of storage

_____ Ravine/private lot

_____ Fenced yard

Please share other "must have" features for your new home:

A few important **details**



1

Will you be sharing this home with someone?
If yes, do they have specific needs?

2

How much will you invest, over and above the purchase price, in terms of financial or sweat equity if you can't find all the features that you want?

\$ _____

3

What is your long-term plan? Is this your forever home or starter home?
Perhaps an investment property down the road? Any insights would be helpful.



Closing cost **calculator**



\$ _____

Purchase Price

\$ _____

Property Transfer Tax

\$ _____

Mortgage Amount

\$ _____

Deposit Required at Time of Offer

\$ _____

Notary/Legal Fees

\$ _____

Property Tax Adjustments

\$ _____

Property Appraisal

\$ _____

Site Survey and/or Title Insurance

\$ _____

Property Inspection

\$ _____

Moving Costs

\$ _____

Net Required (Approximately)





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Home Seller
Checklist

Home Seller Checklist



Seller(s) Name(s): _____

Property Address: _____

How would you like us to communicate with you?

Call to cell

Email

Text

Who do we notify about showing appointments?

Name: _____

Name: _____

Number: _____

Number: _____

Email: _____

Email: _____

How would you like us to confirm appointments?

Leave a voicemail and/or send email and wait for your permission

Automatically give permission once a phone call or email is sent.

Some items to have ready:

Extra set of keys for lockbox (If applicable)

Receipts/warranties for recent improvements

Copy of Drivers licence for Fintrac

Photos of seasonal features (If available)

Land survey (If applicable)

Copies of rental contracts (If applicable)

Most recent property tax bill (If available)

Copies of permits/plans for renovations

When is your ideal closing date?

Date: _____

Immediately

Days: 30 60 90 120 (Circle one).

Other: _____

Key details about your home

Age of Furnace: _____

Type of wiring: Copper Aluminum Knob & Tube

Age of Central Air Conditioner: _____

Other: _____

Age of Roof: _____

Capacity of electrical panel: 60 AMPS 100AMPS 200AMPS

Type of plumbing: PVC ABS Steel

Other: _____

Other: _____

What will be **included and/or excluded** in the sale of your home?



Included or excluded (check one):	Description and/or location of item(s) in home
Light Fixtures <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Window Coverings <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Fridge <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Built-in Microwave <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Range Hood <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Washing Machine <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Clothes Dryer <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Freezer <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Built-in Dishwasher <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Water Softener <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Central Vacuum System <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	

What will be **included and/or excluded** in the sale of your home?



Included or excluded (check one):	Description and/or location of item(s) in home
Wine/ Beverage Cooler <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Garage Door Opener & Remote <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
TV Wall Mount <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Projector & Screen <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Furnace <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Central Air Conditioner <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Humidifier <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Air Cleaner <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Hot Water Tank <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Pool/Hot Tub & Equipment <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	
Storage Shed <input type="checkbox"/> Included <input type="checkbox"/> Excluded <input type="checkbox"/> N/A:	

Tell us **what you love**
about your home



What are the top reasons you bought this home?

Your top 10 favourite features

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Major upgrades, improvements and /or renovations



Date

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

**Any rough-ins not in use now but could be in the future?
(i.e. fireplace, bathroom etc.).**

Major upgrades, improvements and /or renovations



What part of your home do you spend most of your time and why? (Mention if it changes with seasons)

What tech do you have in your home that will appeal to buyers? (i.e. Smart locks, dimmable switches, etc.)

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