



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)



