



# 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

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

Cell: \_\_\_\_\_ Work: \_\_\_\_\_

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

I am best reached by:  Cell phone call  Email  Text

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:

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# 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:

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# A few important **details**



1

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

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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.

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# 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)





