

# Lead / Property Information Sheet

Client/Student: \_\_\_\_\_ Email: \_\_\_\_\_  
 Date: \_\_\_\_\_ Owner's Name: \_\_\_\_\_  
 Source: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Evening: \_\_\_\_\_  
 Address: \_\_\_\_\_ ★ Asking Price: \_\_\_\_\_  
 City \_\_\_\_\_ State: \_\_\_\_\_ ★ What do you think it would appraise for?: \_\_\_\_\_  
 Area of Town: \_\_\_\_\_ Your Comps \_\_\_\_\_ Rent Comps: \_\_\_\_\_  
 Phone: \_\_\_\_\_ \*Rentometer.com

### Existing Mortgage Information (must have)

★ 1<sup>st</sup> - \$ \_\_\_\_\_ Lender \_\_\_\_\_ % Pmt \_\_\_\_\_  
 2<sup>nd</sup> - \$ \_\_\_\_\_ Lender \_\_\_\_\_ % Pmt \_\_\_\_\_  
 Is Payment PITI?  Yes  No Is Payment Current?  Yes  No If No, \$ \_\_\_\_\_ in Arrears

#### **A** If asking price and loan balance are within \$35,000:

Will you sell the house for what you owe on it? **Check One**

- Yes** - OK, I'll have my boss call to set an appointment.  
 What's the best time? \_\_\_\_\_
- No** - If we take over your debt and pay all closing costs, what's the least you could accept for your equity?

**\$** \_\_\_\_\_

#### **B** If A is not applicable:

We can either lease your home with an option to buy, or purchase it as soon as you're ready to close and we usually pay all the closing costs. Would you consider taking a monthly payment until we pay you off in full? **Check One**

- Yes** - OK, I'll have my boss call to discuss terms.  
 What would be the best time to call? \_\_\_\_\_ (get info below)
- No** - So you're saying the only way you will sell is if you get all cash now?  
**Check One**
- Yes** - OK, I understand but that won't work for us. Thanks. (stop here)
- No** - So are you saying you would like to hear how we can buy your house immediately?
- Yes** - OK, I'll have my boss call you.  
 What's the best time to call? \_\_\_\_\_ (get info below)

How did you arrive at your asking price? \_\_\_\_\_ Reason for selling? \_\_\_\_\_

Does it need repairs?  No  Yes, approximate amount? \_\_\_\_\_  Vacant  Occupied

★ When do you want to move? \_\_\_\_\_ Is the house listed?  Yes  No

Down \$ _____
Month \$ _____
Term _____

Client Use Only →

#### Description:

★ Bed/Bath \_\_\_\_\_ ★ Square Feet \_\_\_\_\_ Lot Size \_\_\_\_\_

Construction:  Frame  Brick  Block  Stucco  Other \_\_\_\_\_

Garage:  0  1  2  \_\_\_\_\_ Amenities:  Carport  Basement  Refrigerator  Range  Dishwasher

★ Is it  House  Condo Association fee \$ \_\_\_\_\_ per  Month  Year

Notes: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_