HOME BUYER WORKBOOK

ROOST
REAL ESTATE CO.

SECTION 1: WHO YOU ARE

Buyer Name(s): _____

Phone / Email / Preferred Method of Communication: _____

_____

Current Address: _____

_____

Best Time to Contact: _____

Who Referred You to ROOST Real Estate Co.? _____

Are You a First-Time Buyer? Yes / No

Is Anyone Else Helping With the Purchase? (Family, Financial Advisor, Co-Buyer)_____

_____

SECTION 2: YOUR LIVING SITUATION

Are you currently:

- ☐ Renting (Lease ends: _____)
- ☐ Owning (Do you need to sell first? Yes / No)
- ☐ Living with family/friends

• Are you in a lease contract? If so what is the expiration date?_____

• What's prompting this move now? _____

_____

• On a scale of 1–10, how ready are you to move?

SECTION 3: YOUR BUYING GOALS

Ideal Move-In Date: _____

Target Price Range: _____

Down Payment Available: _____

Monthly Payment Comfort Zone: _____

Have you spoken to a lender? Yes / No

If yes: _____

Lender Name & Contact Info: _____

Pre-Approval Amount: $_____

If no: Would you like us to introduce you to a trusted local lender? _____

SECTION 4: WHAT YOU'RE LOOKING FOR

Must-Haves (Check all that apply):

- ☐ 3+ Bedrooms
- ☐ Garage
- ☐ Walkable Location
- ☐ Big Yard
- ☐ Finished Basement
- ☐ First Floor Living
- ☐ School District: _____
- ☐ Work Commute Time: _____
- ☐ Other: _____

Deal Breakers: _____

_____

_____

Top 3 Things You Want in Your Next Home:

1. _____
2. _____
3. _____

SECTION 5: WHAT DO YOU EXPECT FROM YOUR REALTOR?

The better we understand your expectations, the better we can serve you. Please share your thoughts, using any of the prompts below to guide you:

1. Communication Style

How often do you want updates?_____

Do you prefer calls, texts, or emails?_____

What's your biggest pet peeve when it comes to communication? _____

_____

Example: "I want a quick text when there's an update, not long emails."

2. Availability

Do you need weekend or evening availability? _____

How fast do you expect a response when you have a question? _____

_____

Example: "I have Thursdays and most evenings off."

3. Past Experiences (Optional)

Have you worked with a Realtor before? What went well—or not so well? _____

_____

Anything we should definitely do – or avoid?_____

Example: "My last agent was pushy. I want someone who listens and isn't salesy."

Anything else? _____

_____

WHAT HAPPENS NEXT

The next step is a face-to-face meeting with a ROOST Real Estate Co. professional. This 40–50 minute conversation is designed to help us better understand your goals, your concerns, and what's most important to you about your next move. We'll review everything you've shared in this guide, walk you through the entire buying process, and log into the Multiple Listing Service (MLS) together so you can see exactly what we see as licensed Realtors. This meeting is all about clarity, strategy, and setting you up for success – from the very first step to the day you close on your new home.

We can't wait to meet you.