

Buyer Qualification Sheet

Complete before any showing is scheduled — The Playbook Society

THE
PLAYBOOK
SOCIETY

CLIENT INFORMATION

CLIENT NAME

DATE

PHONE

EMAIL

CURRENT ADDRESS

TRANSACTION TYPE

☐ Purchase ☐ Rental

PROPERTY REQUIREMENTS

BEDROOMS — REQUIRED

BEDROOMS — PREFERRED

GEOGRAPHIC AREA — FIRST CHOICE

ALTERNATIVE AREA 1

ALTERNATIVE AREA 2

PUBLIC TRANSIT REQUIRED?

PARKING — NUMBER OF VEHICLES

FLOOR PREFERENCES OR RESTRICTIONS

ELEVATOR ACCESS REQUIRED?

☐ Yes ☐

OUTDOOR SPACE REQUIRED?

OPEN TO RENOVATION / COSMETIC WORK?

☐ Yes ☐

FINANCIAL POSITION

BUDGET CEILING

FINANCING OR CASH?

☐ Financing ☐

PRE-APPROVAL LETTER / PROOF OF FUNDS — STATUS

LENDER NAME / INSTITUTION

APPROVAL AMOUNT

TIMELINE & DECISION STRUCTURE

MOVE-IN TIMELINE

HOW LONG HAVE THEY BEEN SEARCHING?

ALL DECISION MAKERS IDENTIFIED? — NAMES

MUST SELL CURRENT HOME BEFORE PURCHASE? ☐ Yes ☐ No

CURRENT HOME ADDRESS (IF APPLICABLE)

REPRESENTATION & COMPLIANCE

CURRENTLY UNDER AGREEMENT WITH ANOTHER AGENT? ☐ Yes ☐ No BUYER REPRESENTATION AGREEMENT SIGNED? ☐ Yes ☐ No

NAR AGREEMENT EXPLAINED TO BUYER? ☐ Yes ☐ No

Buyer Qualification Sheet — continued

SEARCH HISTORY & QUALITATIVE NOTES

PROPERTIES ALREADY TOURED — WHAT HAS OR HASN'T WORKED?

WHAT MATTERS MOST TO THEM IN AN AGENT RELATIONSHIP?

ADDITIONAL CONTEXT / NOTES

COMMITMENT ASSESSMENT

☐ If the right property is found tomorrow — is the buyer in a position to move immediately?

☐ Has the buyer committed to working exclusively with you?

SHOWING SCHEDULE

ID	ADDRESS	DATE	TIME	PRICE	NOTES

Remember:

Qualification is not gatekeeping. It is the foundation of every client relationship worth having.

Notes: