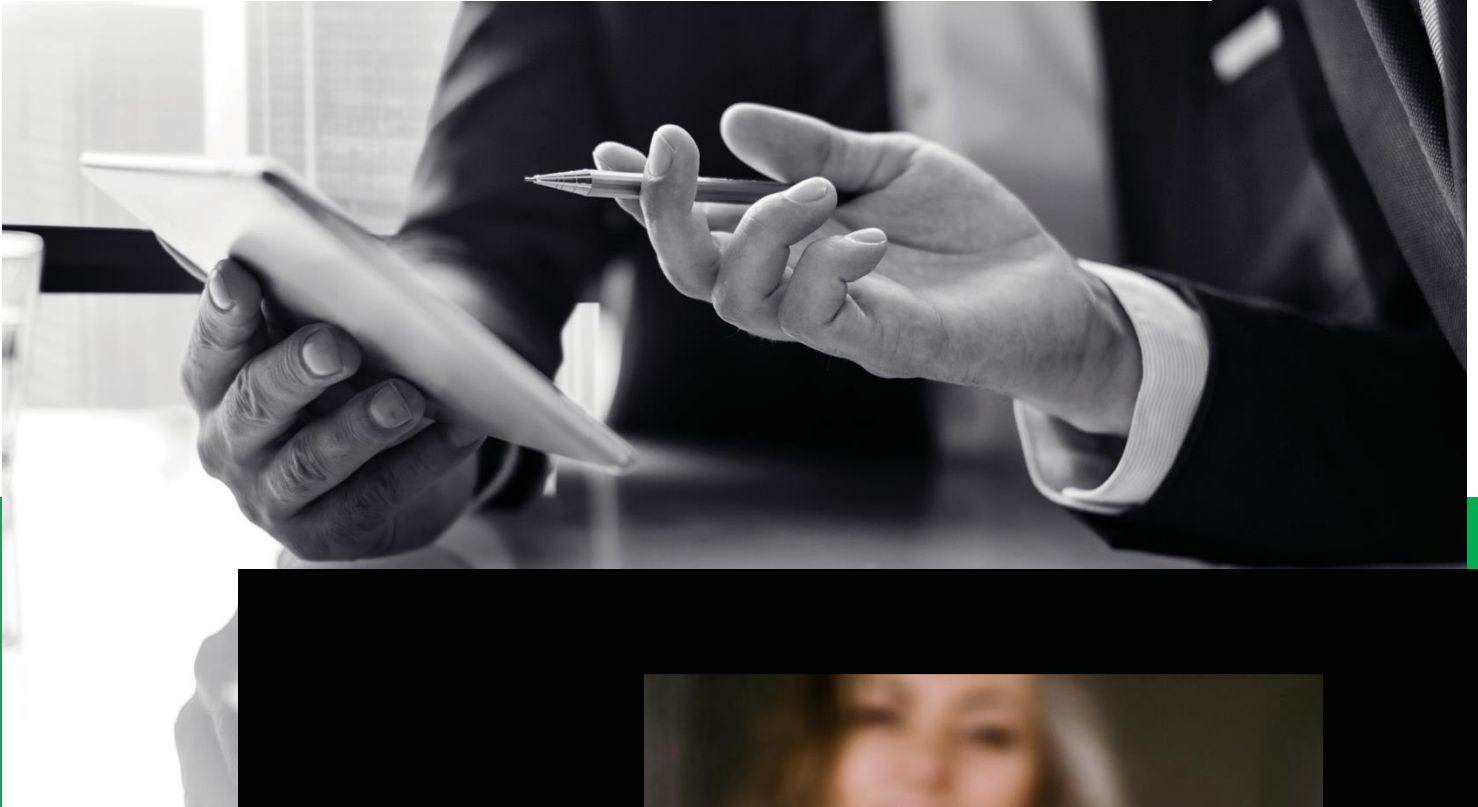


REAL ESTATE ALLIANCE

& LEASE

Your R.E.A.L. Estate Marketplace



**Initial
Consultation**

A color photograph of a woman with long, wavy brown hair, smiling. She is holding a key with a blue and red flower-shaped handle. The background is dark and out of focus.

KAT SODITUS
PRINCIPAL BROKER, REALTOR, NOTARY
541-502-WORK (9675)
KAT@KATSODITUS.COM
OREA# 201241981 & DRE# 01298057

Initial Consultation Questions

Thank you for choosing Kat Soditus! I'll contact you to discuss these questions.

SOURCE: How did you hear about Kat? Past Client? Referral? Social Media? Web? Agent network?
The reason I ask is that I always want to thank those who referred you client to me!

INTEREST: What are you most interested in accomplishing with buying / selling, and why?

EXPERIENCE: Have you purchased and/or sold a home before? Have you done so recently?
What real estate experience do you have? What would you like to change during this process versus the last time?

TIME FRAME: When do you plan to buy/sell? What is important to you around the timeframe (work relocation, school calendar, etc.).

FINANCIAL CAPACITY: What is your financial capacity or situation? Do you have money for a down payment? Have you been pre-qualified? What is the payoff for your current home? What do you think your current home is worth? If you are already pre-qualified, who is the loan officer or would you like a recommendation to my vetted local lenders & resources?

DECISION MAKER: Who will be involved in the decision-making process? Is it just you, a partner/spouse, parents, or anyone else you rely on for making the decision?

CONCERNS: What are your concerns about buying/selling right now? Do you have any concerns about the current marketplace, interest rates, making a financial commitment to a home?

OBJECTIVES: What are your ultimate objectives for buying/selling? In other words, what is the most important outcome that the move would accomplish?

REVIEW: Let's review the information you provided.

NEXT STEPS: Let's set a time to meet!

Kat's Initial Consultation & Intake Form

NAME: _____

ADDRESS: _____

CONTACT INFORMATION & SOURCE: _____

BEST TIMES TO CONTACT AND PREFERRED METHOD OF COMMUNICATION _____

INTEREST: _____

EXPERIENCE: _____

PRICE RANGE/PAYOFF AMOUNTS: _____

TIME FRAME: _____

CONCERNS: _____

DECISION MAKERS: _____

OBJECTIVES AND NEXT STEPS: _____
