



Welcome Home

Buyer's Guide

General Information

Buyer

Name: _____

Address: _____

Phone Number: _____

E-mail Address: _____

Which days are you available for showings? _____

What is your preferred time of day? _____

Co-Buyer

Name: _____

Address: _____

Phone Number: _____

E-mail Address: _____

Price & Financing

Buying method: ☐ Cash ☐ Finance

Have you been pre-approved: ☐ Yes ☐ No

Are you a first time home buyer: ☐ Yes ☐ No

Are you currently selling your home: ☐ Yes ☐ No

Are you currently in a lease: ☐ Yes ☐ No

When does it expire? _____

If you identify a property, are you ready to make an offer now? ☐ Yes ☐ No

Lender Contact: _____

Loan Officer: _____

Phone Number: _____

E-mail Address: _____

Approved Amount: _____

Home Requirements

Bedrooms: _____

Bathrooms: _____

Garage spaces: _____

Square footage: _____

Type of home: _____

New: ☐ Yes ☐ No

Resale: ☐ Yes ☐ No

Both: ☐ Yes ☐ No

If resale, is an older home acceptable? ☐ Yes ☐ No

How old? _____

Desired Location:

City, area, or neighborhood: _____

School district: _____

Are you familiar with your desired location? _____

Are stairs acceptable? ☐ Yes ☐ No

Do you want an energy efficient home? ☐ Yes ☐ No

Energy efficient features: _____

Does your new home require accommodations for anyone with disabilities? ☐ Yes ☐ No

Are there any other specific features not addressed in this questionnaire that you wish to be included in the property search?

Circle the most important features:

Open floor plan Attic Formal dining

Office or study Bonus room Pool

Basement Patio or deck Fireplace





Welcome Home

Buyer's Guide

Buyer Details

Name:

Address:

Phone Number:

E-mail Address:

Availability

Preferred method of contact:

Preferred time of day:

Which days are you available for showings?

Financing Information

Buying method:

Reason for buying:

Have you been pre-approved:

☐ Yes ☐ No

Are you a first time home buyer:

☐ Yes ☐ No

Are you currently selling your home:

☐ Yes ☐ No

Are you currently in a lease:

☐ Yes ☐ No

When does it expire?

If you identify property, are you ready to make an offer now?

What price range are you interested in?:

Loan Officer:

Phone Number:

E-mail Address:

Pre-approved Amount:

Proof of funds:

☐ Yes ☐ No

Which loan type are you considering?



Home Requirements

City, area, or neighborhood:

School district(s):

Are you familiar with your desired location? ☐ Yes ☐ No

Bedrooms:

Bathrooms:

Garage spaces:

Square footage:

Type of home:

Do you want an energy efficient home? ☐ Yes ☐ No

Energy efficient features:

Are there any other specific features not addressed in this questionnaire that you wish to be included in the property search?

Circle the most important features:

Open floor plan Patio/ Deck Pool

Basement Office Bonus room

Attic Fireplace Formal dining

New: ☐ Yes ☐ No

Resale: ☐ Yes ☐ No

Both: ☐ Yes ☐ No

Age of home:

Are stairs acceptable?

Does your new home require accommodations for anyone with disabilities?



Jen Tieszen

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Moving Checklist

Moving is so stressful for many reasons but planning out your move can help you manage. Use this checklist to help you prepare for your move and to make it as painless as possible.

8 Weeks Out

- Schedule in-home estimates with reputable moving companies and compare
- Request time off work/ child care for moving day
- Request school transcripts and register at new school
- Sort through things to keep, sell, give or trash
- Create an inventory of your home

6 Weeks Out

- Start gathering boxes and other moving containers
- Address necessary home repairs in your current home
- Sell what you can
- Donate items in good condition that you did not sell
- Throw away items you're not moving

4 Weeks Out

- Select your moving company or reserve your rental truck
- Start packing - separate valuables and label each box
- Gather all financial, legal and medical records in one place
- Research professional services like doctors, dentists, or vets if your move requires you to change providers
- Find cable and internet providers who serve your new address and schedule your installation appointment
- Confirm travel plans

2 Weeks Out

- Cancel or transfer utilities, services and gym membership
- Forward medical records
- Confirm your rental truck
- Dispose of hazardous materials
- Submit a change of address with your local post office
- Plan meals to use up food in fridge

1 Week Out

- Pack an overnight bag for everyone moving
- Pack an essentials box for what you'll need for the first few days
- Have cash on hand to tip movers

Moving Day!

- Wake up early and ready to tackle the day
- Protect floors and carpets
- Give movers a tour and moving instructions
- Dispose of all trash
- Finish the final cleaning
- Take pictures and videos of the empty place to prove move-out condition
- Do a final walk-through of each room to ensure there is nothing left behind
- Leave keys and garage door openers

Notes:



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Change of Address

Checklist

Home Services

- ☐ Electric Company
- ☐ Gas Company
- ☐ Water Company
- ☐ Sewer Company
- ☐ Garbage and Recycling
- ☐ Pest Control Service
- ☐ Home Security Company
- ☐ Internet Service
- ☐ Cable Provider
- ☐ Telephone Service
- ☐ Lawn care Service
- ☐ Cleaning Service
- ☐ Pool Maintenance Service

Financial Services

- ☐ Banks/ Credit Unions
- ☐ Credit Card Companies
- ☐ Loan Companies/ Lenders
- ☐ Student Loans/ Financial Aid
- ☐ Investment Banker
- ☐ Financial Planner
- ☐ Retirement Account Administrators

Government Agencies

- ☐ USPS Mail Forwarding
- ☐ Internal Revenue Service
- ☐ Department of Motor Vehicles
- ☐ Voter Registration
- ☐ Social Security Administration
- ☐ Business License Office
- ☐ State Dept. of Taxation
- ☐ Local/ County Tax Commissioner

Insurance Companies

- ☐ Health Insurance
- ☐ Life Insurance
- ☐ Homeowner's Insurance
- ☐ Renter's Insurance
- ☐ Car Insurance
- ☐ Dental Insurance

Professional Services

- ☐ Doctor/ Pediatrician Offices
- ☐ Optometrist/ Ophthalmologist
- ☐ Dental Office
- ☐ Veterinarian
- ☐ Therapist/ Counselor
- ☐ Pharmacy
- ☐ Attorney

Memberships & Retailers

- ☐ Gym Membership
- ☐ Club Membership
- ☐ Online Retailers
- ☐ Magazines and Catalogs

Community

- ☐ School, PTA, Extra-curricular
- ☐ Employers
- ☐ Church, Synagogue, etc.
- ☐ Charitable Organizations
- ☐ Pet Groomer
- ☐ Daycare Facility
- ☐ Country Club
- ☐ Community Groups



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Home Inspection

Checklist



When it comes to buying a home, what you see isn't exactly what you get. A home inspection will protect you against undetected issues and will give you the opportunity to know the house before you close. Use this list to get the most value out of your inspection.

Grounds

- Trees in good condition without overhanging or touching the roof
- Landscaping, driveway and walkways in good condition with no significant cracks
- Drainage away from the house with no standing water
- No evidence of leaks from septic tank
- Deck and stair railings are secure
- Detached garage, shed, fence and deck show no rotted wood or evidence of termites

Exterior

- Exterior walls appear straight with no sagging, bowing or staining
- Windows and door frames appear square
- Siding has no cracks, decay or curling
- Bricks show no damage or cracks in joints
- Stucco shows no large cracks
- Paint is not flaking or blistered
- Roof shingles are not missing or damaged and show no curling or cupping
- Gutters show no decay and drain properly
- Chimneys appear straight and undamaged
- Automatic garage door operates properly and stops for obstructions

Interior

- Floors, walls and ceilings appear straight and level without visible stains, cracking or damage
- Doors open easily and latch properly when closed
- Lights and switches operate properly
- Adequate number of electrical outlets in each room
- Heating and air conditioning vents in all rooms
- Fireplace has no cracking and shows no staining
- Fireplace flue has been cleaned and is lined
- Smoke detectors and carbon monoxide detectors are working properly and located properly
- Stairway treads and risers are solid

Bathrooms

- Visible plumbing under sink is in good condition and shows no signs of water damage
- Ground fault circuit interrupter (GFCI) receptacles for all electrical outlets located within 6 feet of sinks
- Adequate water pressure for hot and cold water at all fixtures
- Tub, shower and sinks drain smoothly
- Toilet flushes and fills properly
- Toilet is stable, with no rocking or stains at base
- No evidence of leaking around base of tub or shower

Kitchen

- Visible plumbing under sink is in good condition and shows no signs of water damage
- Ground fault circuit interrupter (GFCI) receptacles for all electrical outlets located within 6 feet of sinks
- Working exhaust fan vents to outside
- Garbage disposal is operational
- Water flow to sink is adequate and drains properly
- Dishwasher drains properly and shows no evidence of leaks
- Built-in appliances operate properly
- Cabinets are in good condition

Basement

- No evidence of moisture
- No evidence of water damage to above floor
- No staining or major cracks in exposed foundation
- Sump pump operates properly
- Visible floor joists show no damage, decay, or staining and appear straight



Attic

- No evidence of staining from roof
- Structure shows no damage or decay
- Adequate ventilation through soffit vents and end louvers
- Insulation is sufficient and installed properly
- Electrical splices are contained

Crawl Space

- Adequate ventilation to the exterior
- No evidence of damage from moisture and insects
- Insulation between crawl spaces and heated areas
- Water supply and waste pipes are insulated

Heating and Cooling Systems

- No gas odor
- Air conditioning and heating operate well
- Air filters are clean
- Flues have no open seams and slow up to chimney connection
- Cooling unit has no visible rust
- Duct work is in good condition

Electrical Systems

- Wiring is in good condition
- Service panel has normal capacity with cables attached correctly
- Cables are secured and protected
- No exposed electrical splices

Plumbing

- Visible pipes have no damage or evidence of leaks
- Water heater shows no signs of rust
- Manufacture date of water heater is within length of expected use
- Water pressure falls within accepted range
- Hot water temperature does not exceed 125-degrees Farenheit

Questions to ask your home inspector:

1. Are you licensed or certified?
2. What is covered or not covered in this home inspection?
3. How well is the home insulated?
4. Is the plumbing in good order?
5. Is the electrical system current or upgraded?
6. Does the house need to be brought up to code?
7. Is the house structurally sound?
8. What are your major concerns?
9. How is the grading and drainage?
10. What fire, safety, health. and water hazards exist here?
11. What should I repair first?
12. What else could go wrong?
13. What is the condition of the roof?
14. Will the trees on the property be a hazard down the road?
15. Do I need to hire a specialist?

Notes:



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Under Contract

Closing Timeline



Property Address:

Purchase Price:

Escrow Deposit:

Title Company:

Escrow Officer Contact:



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Congratulations! You are officially under contract.
Use this timeline to ensure a smooth closing.

Important Dates:

OFFER ACCEPTANCE

EARNEST MONEY PAID

LOAN APPLICATION

HOME INSPECTION

HOME APPRAISAL

LOAN COMMITMENT

OBTAIN INSURANCE BY:

SCHEDULE MOVERS BY:

FINAL WALK-THROUGH

CLOSING DATE

Contact

Information



Property Address:

Purchase Price:

Earnest Money Deposit:



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Lender / Mortgage Company

Loan Officer Name

123-456-7890

Loanofficer@mortgage.com

123 Somewhere Ave., Ste 123
Some City ST 12345

Title / Escrow Company

Escrow Officer Name

123-456-7890

Escrowofficer@title.com

123 Somewhere Ave., Ste 123
Some City ST 12345

Home Warranty Company

Insurance Agent Name

123-456-7890

Insuranceagent@insurance.com

123 Somewhere Ave., Ste 123
Some City ST 12345



Loan Documentation

Checklist



Every mortgage loan may be different, but the documentation lenders will need in order to pre-approve a loan are standard. The common items are listed here. Be ready to submit these along with your application:



Valid Driver's License or other acceptable form of ID



Social Security card



Two year residential address history



Two year work history



Income verification - Employer name and address



Two recent years of W-2s



Two recent pay stubs



Two months of bank statements



Copies of recent federal tax returns



List of assets - particularly real estate owned



If VA - Certificate of Eligibility



If self-employed - business license, personal and business federal tax returns, business bank statements, and business Profit & Loss Statement



Mortgage Process



Home buying is an exciting and rewarding experience, but it can also be the most challenging if you don't understand the mortgage process. Preparing for this journey and knowing what to expect will help you make the best decisions about your home purchase. Here is the mortgage process at a glance.

1

Application

Complete your application and submit the requested documents to your lender.

2

Pre-approval

Your application will be reviewed and a pre-approval letter will be issued.

3

House Hunt

Work with your real estate agent to find a property and get it under contract.

4

Appraisal

An appraisal will be ordered.

5

Processing

Your loan will be processed and prepared for underwriting.

6

Underwriting

Your loan will be formally underwritten for approval.

7

Conditions

Satisfy all conditions assigned by the Underwriter.

8

Clear-to-Close

Clear the file and approve for closing.

9

Close

Sign documents to close on your new home.

