

Seller Call-in Lead Interview Sheet

Property Address: _____ Date: _____ Lead Source: _____
_____ Home Phone: _____
Contact Person: _____ Cell Phone: _____
Owner(s) on Title: _____ Work Phone: _____
Mortgage Holder: _____ Email: _____

Do you currently live in the home: _____ How Long: _____ Style of Home: _____ Sq. Feet: _____
Unit 1: Bed _____ Bath: _____ Rent: _____ Unit 2: Bed _____ Bath: _____ Rent: _____ Unit 3: Bed _____ Bath: _____ Rent: _____
Unit 4: Bed _____ Bath: _____ Rent: _____ Unit 5: Bed _____ Bath: _____ Rent: _____ Unit 6: Bed _____ Bath: _____ Rent: _____
Garage: _____ Lot Size: _____ Special Features: _____

Any Repairs Needed: _____ Repair Cost \$: _____
Is the Home Listed: _____ Price: _____ How Long: _____ Any Offers: _____ How Much: _____
Realtor: _____ Phone: _____ Listing Expires: _____

Motivation & Price

Is there a particular reason you are looking to sell at this time? _____
How quickly are you looking to sell? _____
What are you looking to sell the property for? _____ Is that price flexible? _____
How did you establish that number? _____
If I can offer you cash and close quickly what is the best you can do? _____
Can you do any better than that? _____
What are you going to do if the property does not sell? _____

Mortgage Information

What do you currently owe on the property? _____ Any other liens or Mortgages? _____
Are you current on the payments? _____ Months Behind? _____ Amount Behind? \$ _____
Back Taxes: _____ Other Lien Amounts: _____
What is your monthly payment? _____ Does that include Taxes and Insurance? _____ Taxes: _____ Insurance: _____
Interest Rate: 1st _____ 2nd _____ Fixed () _____ Adjustable () _____ Prepayment Penalty: _____
Mortgage Company: 1st _____ 2nd: _____

Subject To

If I could give you some cash now and take over the responsibility for the payments on the mortgage how much cash would you need to move? _____ Is that the best you can do? _____ What do you need that money for? _____

Follow Up and Discussion Notes/Needs

Date: _____ How: _____ Notes: _____
Date: _____ How: _____

Evaluator: _____ Appointment Date: _____ Time: _____
After Repair Value: _____ Confident Not Confident Exit Strategy: _____
As Is Value: _____ Confident Not Confident _____
Repair Cost: _____ Confident Not Confident Offer 1: _____
Likely Purchase: _____ Confident Not Confident Offer 2: _____