



VANGUARD REALTY



NEW BUYER INTAKE FORM

ABOUT YOU

Name(s): _____

Marital Status of each person: _____ # of children _____

Names of children: _____

Current Employers: _____

CONTACT INFORMATION

Current Mailing Address: _____

Best Phone Numbers to Reach You: _____

Best Time of Day to Reach You: _____

Best Email(s) to Reach You: (for e-signing, each person must have their own email address)

How often do you want to be contacted?: 2-3 times/wk ☐ Weekly ☐ As Needed ☐

How do you want to be contacted? Email ☐ Phone ☐ Text ☐ Any ☐

ABOUT YOUR MOVE/MORTGAGE

Is a lease expiring or military orders to report date? Yes ☐ No ☐ Date: _____

Do you have another home you must sell before buying? Yes ☐ No ☐

Are you already pre-qualified for a mortgage? Yes ☐ No ☐ Paying cash ☐

Amount of pre-qualification: \$ _____ Preferred monthly payment: \$ _____

Do you have \$5000-\$7000 cash for closing costs and prepaids? Yes ☐ No ☐

How much do you anticipate your down payment might be? _____% (0-100%)

Will you be using a Gift Letter for either the down payment or closing costs? Yes ☐ No ☐

Name of your lender: _____

Name of your Loan Officer: _____

Phone #: _____ Email: _____

(if you do not already have a lender, I have worked with several and would be happy to refer you to someone)

ABOUT YOUR NEW HOME

Preferred areas: (check all that apply):

Duval County ☐ Clay County ☐ Near NAS ☐ Near Mayport ☐
Near Cecil Field ☐ Nassau County ☐ Putnam County ☐ Baker County ☐
St. Johns County ☐ Northside ☐ Southside ☐ Beaches ☐
Westside ☐ Downtown/Historic ☐ Green Cove Springs ☐ Lake Asbury ☐
Middleburg ☐ Fleming Island ☐ Orange Park ☐ Out of Area ☐

Are your children currently enrolled in school? Yes ☐ No ☐

Do you want them to stay in the same school? Yes ☐ No ☐

Which school(s) _____

of bedrooms _____ # of bathrooms _____ # of garage spaces _____

What are your 3 must-haves? _____

What are your 3 nice-to-haves? _____

What are your 3 deal-breakers? _____

Are you interested in new construction? Yes ☐ No ☐ Maybe ☐

Special amenities you'd like to have in a new home: (Check all that apply)

In home office area ☐ Waterfront property ☐ Swimming pool/community ☐
Swimming pool/private ☐ Screened patio ☐ Storage shed ☐
Acreage ☐ Historic property ☐ Open Concept layout ☐
Fixer-Upper ☐ Hot Tub ☐ One Story ☐
Two or more story ☐ Gated Community ☐ 55+ Community ☐
Navigatable to Ocean ☐ Boat House/dock ☐ Preserve views ☐

What else would you like me to know that would help me to better serve you?

Who else do you know that may be looking to buy or sell a home?