

Getting to Know You

Pre-Strategy Session

1. When is your time frame for purchase? _____
2. What price range do you have in mind? _____
3. How much cash do you want to use for purchase? _____
4. Circle all that apply: Rental, 2nd home, permanent residence
5. Do you need to sell something else first? _____
6. Would you like to see a sample closing statement? Yes No
7. Circle for more information: Regimes, taxes, insurance?
8. What Realtor services have you found helpful in the past?

9. Areas of interest: Hilton Head, Bluffton, Daufuskie, other _____
10. Pre approval can save you thousands in negotiation. Can we schedule a free financial strategy session for you? _____

Full Names _____

Email _____

Phone/Best time to call: _____

Fax Back to 1-866-680-1137



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