

## PRE LISTING APPOINTMENT QUESTIONNAIRE

Property: \_\_\_\_\_

Date: \_\_\_\_\_ Taken By: \_\_\_\_\_

Seller's Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone: H: \_\_\_\_\_ W: \_\_\_\_\_

Cell: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

1. How Did You Hear about me?

\_\_\_\_\_  
\_\_\_\_\_

2. Why do you want to sell? \_\_\_\_\_

3. Referred by: Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

Referral fee: \_\_\_\_\_

4. Who else are you interviewing?

Agent

Office

Appointment Date/Time

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\*\*\*Remember, You want to be the last appointment the seller meets with. Make this and reschedule if necessary. You can say, "Meeting with all the other brokers first will guarantee a maximum of questions. You can better serve them if they have the maximum amount of questions available."

5. If I answer all of your questions to your satisfaction, will you list your property when we meet? \_\_\_\_\_
6. Would it be possible for all decision makers to be present and meet with me on (Date)\_\_\_\_\_ (Time)\_\_\_\_\_?  
Is it possible to meet at my office? \_\_\_\_\_. If not, then where? \_\_\_\_\_.
7. Who will be present? \_\_\_\_\_
8. When I meet with you, will you want to start the marketing? \_\_\_\_\_
9. Do you own any other properties in the area? \_\_\_\_\_  
If yes, where? \_\_\_\_\_
10. Are you thinking of listing them also? \_\_\_\_\_
11. Where are you moving? \_\_\_\_\_
12. Do you know a real estate professional there? \_\_\_\_\_
13. When do you need to sell? \_\_\_\_\_
14. What price do you want to list? \_\_\_\_\_
10. How much are your existing mortgages?  
1st \$ \_\_\_\_\_  
2nd \$ \_\_\_\_\_  
3rd \$ \_\_\_\_\_
11. Do you need accounting capital gain / loss advice? \_\_\_\_\_

17. What criteria are you going to use in hiring an agent? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18. I will be mailing you a pre-meeting information packet or emailing you a link to our website information packet link. Can I ask you to review it prior to your meeting with me? \_\_\_\_\_

19. May I ask that you wait to make a decision on your agent until you meet with me? \_\_\_\_\_

20. Can we arrange some FREE time for you to consult with a CGA? \_\_\_\_\_

21. Tell me about your property? \_\_\_\_\_

Type	Sq. Ft.	Bed/Bath	Income	Length of Lease
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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

22. Any other amenities of property? \_\_\_\_\_

23. Assistant to prepare CMA office work

Today    Today/Tomm    Tomorrow    Later Date \_\_\_\_\_

Criteria for CMA:

Area(s): \_\_\_\_\_ Type: \_\_\_\_\_ Size: \_\_\_\_\_

Area(s): \_\_\_\_\_ Type: \_\_\_\_\_ Size: \_\_\_\_\_

Geographical Criteria:

Price Range Search: \_\_\_\_\_ to \_\_\_\_\_

Number of CMA Copies: \_\_\_\_\_

24. Follow-up Instructions:

- A.  Run an assessment, sold & expired check of subject property.
- B.  Check to see if sellers own any other property in areas of Kelowna: \_\_\_\_\_  
\_\_\_\_\_
- C.  Run a list of needs for listing presentation.
- D.  Please confirm that all decision makers will be present at meeting.
- E.  Deliver confirmation package to them.
- F.  Add to Farm or Sphere List.
- G.  Input haves/wants in computer.
- H.  Property Profile Package.
- I.  Is CMA complete/accurate?
- J.  Record Mock listing on Internet.
- K.  Record information on 800 service.
- L.  Prepare mock brochure and virtual tour.
- M.  Confirm that presentation is complete.
- N.  Get extra key made by the seller.
- O.  Make sure you have sign, rider, brochure box, map to property, digital camera, locbox, tape measure ready to go in car.