

HOME BUYER WORKSHEET

Welcome to your Home Buyer Worksheet. This tool will help you narrow in on the features you want in your new home, help define your budget, and guide you in thinking about how you plan to use your home, this helps better understand what areas are non-negotiable vs. nice-to-haves.

Location and Neighborhood

- Do you want to be in town or country? Would you like any land?
- What School District do you prefer or have to have?
- Specific neighborhood that you want to be in or avoid?
- How far are you willing to commute?

Size and Layout

- How many bedrooms and bathrooms do you need for your family and guests?
- Do you need extra space for a home office, gym, or hobby room?
- Do you prefer a single-story home, or are you open to multiple levels?
- Is an open floor plan important to you, or do you prefer more defined spaces?
- Do you need a large kitchen or a particular layout for entertaining?

Outdoor Space

- How important is outdoor space? Do you need a large backyard, garden, or patio area?
- Do you need space for pets or children to play?
- Do you want room for outdoor entertainment, such as a deck, pool, or BBQ area?

Style and Design

- Are you drawn to a particular style of home (e.g., modern, traditional, cottage, etc.)?
- Are you open to homes that may need updating or renovations, or do you need a move-in-ready home?
- Is natural light important to you? Do you have specific preferences for windows and lighting in the home?

Storage and Organization

- Do you need a lot of storage space, such as a large basement, attic, or garage?
- Do you require closet space or specific storage features (e.g., walk-in closets, pantry, mudroom)?

Condition and Age of the Home

- How old of a home are you willing to consider? Are newer homes or historic homes more appealing to you?
- Are you open to homes that may need repairs or renovations, or do you prefer something that's fully updated?

Must-Have Features

- Are there any specific features you absolutely must have, such as a fireplace, a garage, a swimming pool, or a large kitchen island?
- Are there features you absolutely want to avoid, such as a home near busy roads, or a certain layout that doesn't work for you?



After looking over and discussing some of the talking point questions, what are the non-negotiables for you vs the nice-to-haves? We prefer to keep these limited to three in each category, however, buying a home is not a one size fits all model and you may find you have more in one category vs. the other. As you are narrowing in on this list, think about what are you willing to be flexible on, and what you absolutely cannot veer from!

Non-Negotiables

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Nice-to-Haves

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Price and Financial Considerations

- Do you have a specific price range in mind that you're not willing to exceed?
- Do you need to factor in potential home improvements or renovations in your budget?

Understanding your budget is a key part of the home-buying process. Here is a checklist that is great to have (not a must have) completed before beginning the home buying process. You never know when your next home is going to hit the market, and we want you to be prepared.

- Pre-Approval Letter from bank
- Type of Loan
- Loan Terms (length & %)
- Downpayment Amount
- Monthly Payment Limit