# Real Estate Client Intake Form

*This form is used by real estate agents to collect essential information from clients to understand their property needs, preferences, and contact information. It streamlines the buying, selling, or renting process by organizing all pertinent data in one place.*

## Client Information

**Full Name:** {fullName}

**Email:** {email}

**Phone Number:** {phoneNumber}

**Preferred Method of Contact:** {preferredContactMethod}

## Client Status

**Are you looking to:** {clientGoal}

**Are you a first-time buyer?** {firstTimeBuyer}

## Property Requirements

**Property Type:** {propertyType}

**Preferred Location:** {location}

**Budget Range:** {budgetMin} - {budgetMax}

**Preferred Number of Bedrooms:** {bedrooms}

**Preferred Number of Bathrooms:** {bathrooms}

**Desired Square Footage:** {squareFootage}

**Must-Have Features:**

{#mustHaveFeatures}

* {feature}

{/mustHaveFeatures}

**Optional or Nice-to-Have Features:**

{#niceToHaveFeatures}

* {feature}

{/niceToHaveFeatures}

## Financing Information

**Do you have mortgage pre-approval?** {mortgageApproved}

{#mortgageApprovedYes}**Pre-Approval Amount:** {preApprovalAmount}{/mortgageApprovedYes}

**Will you require financing assistance?** {needsFinancingHelp}

## Timeline

**Ideal Move-in Date:** {moveInDate}

**How soon are you looking to make a transaction?** {transactionTimeline}

## Additional Notes

{additionalNotes}

## Household Members

A list of people who will be living in the property:

|  |  |  |
| --- | --- | --- |
| **Name** | **Age** | **Relationship** |
| {#householdMembers}{name} | {age} | {relationship}{/householdMembers} |

## Agent Notes

{agentNotes}