



## PROSPECT/CLIENT/BUYER DATA PROFILE SHEET

1. Agent: \_\_\_\_\_ 2. Agent #: \_\_\_\_\_  
3. Prospect/Client/Buyer #: \_\_\_\_\_

### PROSPECT/CLIENT/BUYER

4. Last Name: \_\_\_\_\_ 5. First Name: \_\_\_\_\_  
6. Spouse's First Name: \_\_\_\_\_ 7. Number of Children: \_\_\_\_\_  
8. Source of Lead: \_\_\_\_\_ Date First Contacted: \_\_\_\_\_

### CURRENT ADDRESS

9. Street: \_\_\_\_\_ 10. City: \_\_\_\_\_  
11. State: \_\_\_\_\_ 12. Zip: \_\_\_\_\_ 13. Current Phone: \_\_\_\_\_  
14. Cell Phone: \_\_\_\_\_ e-mail: \_\_\_\_\_

### EMPLOYER

15. Employer Name: \_\_\_\_\_  
16. Employer Phone: \_\_\_\_\_

### PRICE RANGE

17. Low End: \$ \_\_\_\_\_ 18. High End: \$ \_\_\_\_\_

### REASSIGNMENT

19. Date Reassignment Takes Effect: \_\_\_\_\_

### ANTICIPATED DATES

20. Contract: \_\_\_\_\_ 21. Closing: \_\_\_\_\_

### AGENCY AGREEMENT

22. Agency Date: \_\_\_\_\_ 23. Expiration Date: \_\_\_\_\_  
24. Amount of Retainer Collected: \$ \_\_\_\_\_

### HOME PURCHASE

25. Number of Homes Viewed: \_\_\_\_\_ 26. Contract Date: \_\_\_\_\_  
27. Closing Date: \_\_\_\_\_ 28. List Price: \$ \_\_\_\_\_  
29. Pre-Purchase Appraisal: \$ \_\_\_\_\_ 30. Purchase Price: \$ \_\_\_\_\_  
31. Gross Commission: \$ \_\_\_\_\_

**LENDER**

32. Lender's Name: \_\_\_\_\_ 33. Phone: \_\_\_\_\_  
34. Originator: \_\_\_\_\_ 35. Processor: \_\_\_\_\_  
36. Street: \_\_\_\_\_  
37. City: \_\_\_\_\_ 38. State \_\_\_\_\_ 39. Zip: \_\_\_\_\_  
40. Loan Amount: \$ \_\_\_\_\_ 41. Rate: \_\_\_\_\_ 42. Term: \_\_\_\_\_  
43. Type: \_\_\_\_\_ 44. Caps: \_\_\_\_\_ 45. Index: \_\_\_\_\_ 46. Margin: \_\_\_\_\_  
47. Adjusting Frequency: \_\_\_\_\_ 48. Effective Date: \_\_\_\_\_  
49. Interest Rate Buy Down: \_\_\_\_\_ 50. Discount Points: \_\_\_\_\_

**INSURANCE**

51. Company: \_\_\_\_\_ 52. Phone: \_\_\_\_\_  
53. Street: \_\_\_\_\_  
54. City: \_\_\_\_\_ 55. State: \_\_\_\_\_ 56. Zip: \_\_\_\_\_  
57. Agent: \_\_\_\_\_ 58. Initial Rate: \_\_\_\_\_  
59. Deductible: \_\_\_\_\_

**SAVINGS ON**

60. Total Closing Cost: \$ \_\_\_\_\_ 61. Savings on Closing Cost: \_\_\_\_\_  
62. Warranty by Seller: \$ \_\_\_\_\_ 63. Seller Repairs: \$ \_\_\_\_\_  
64. Rates & Points Savings: \$ \_\_\_\_\_ 65. Insurance: \$ \_\_\_\_\_  
66. Other: \$ \_\_\_\_\_ 67. Total Savings: \$ \_\_\_\_\_

**NEW ADDRESS**

68. Street: \_\_\_\_\_ 69. Phone: \_\_\_\_\_  
70. City: \_\_\_\_\_ 71. State: \_\_\_\_\_ 72. Zip: \_\_\_\_\_

**BUYER INFORMATION**

73. Client Nickname: \_\_\_\_\_ 74. Spouse's Nickname: \_\_\_\_\_  
75. Client's Hobbies: \_\_\_\_\_ 76. Spouse's Hobbies: \_\_\_\_\_  
77. Client's Birthday: \_\_\_\_\_ 78. Spouse's Birthday: \_\_\_\_\_

79. Information on the Children:

Names                      Dates of Birth                      Interest

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

**CONTACTS**

80. Corporation First Contacted: \_\_\_\_\_ 81. Buyer First Contacted: \_\_\_\_\_  
82. Last Contact with Buyer: \_\_\_\_\_ 83. Next Contact Planned: \_\_\_\_\_  
84. Dates of Follow-up Program Brochures and Information Sent:  
1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_ 5. \_\_\_\_\_  
6. \_\_\_\_\_ 7. \_\_\_\_\_ 8. \_\_\_\_\_ 9. \_\_\_\_\_ 10. \_\_\_\_\_

**STATUS:** \_\_\_\_\_

**AGENT NOTES / COMMENTS:**