THE ULTIMATE

"I Wanna Buy A House!"

CHECKLIST

Instructions:

1. Answer the questions with your significant other. (Not buying together? Skip to #3.)

2. Discuss, deliberate, have a brief existential crisis, question your place in the world and everything, then calmly come to an agreement. No seriously: You're going to disagree about some things. This worksheet is a chance to talk those differences out.

3. Take these answers to your real estate agent, who will be overjoyed you aren't a hot mess!

Remember: There are no right answers. Only your answers.

Section #1 | Hopes and Dreams

Objective: Acknowledge your underlying reasons for wanting to buy a home.

Why are you buying a home?

Check all that apply. If there's one reason you feel speaks especially to you, circle it with some hearts. Y'know. If you want.

- [ ] Because I've always wanted to own a home
- [ ] For the tax benefits
- [ ] Sick of my rent going up
- [ ] Because I'm getting married / we want a place to raise a family
- [ ] To get into a good school district
- [ ] To build a nest egg for retirement
- [ ] Because we need a bigger place
- [ ] To rent it out / extra income
- [ ] For the ability to update / design how I wish

Any other reasons?

____

____

____

In your own words, what's the most important thing to you about owning a home?

The feeling of accomplishment? The yard? Entertaining? The garage? The extra bedroom for the in-laws?

____

____

____

How would you describe the right neighborhood for you right now?

Quiet? Bustling? Filled with lots of same-age families?

____

____

____

Section #2 | Your Support Network

Objective: Set your expectations for your friends, family, and any expert partners (agents, lawyers, etc.) you may work with along the way.

Name specific friends, family, and expert partners who will fill these roles.

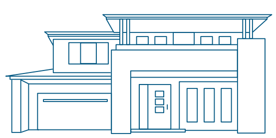
Co-Buyer Will anybody be buying or co-signing with you? Your significant other? Your parents?	**Adviser** Who will be guiding you along the way?	**Co-Shopper** Who will be helping you pick the right place?	**Emotional/Texting Support** Who will always be there when you need them?

Section #3 | The Property

Objective: Get a handle on your knowledge and assumptions about what you want in a home.

Which of these most closely resembles the house you're looking for?

☐ Craftsman

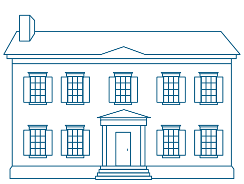


☐ Modern

☐ Victorian

☐ Townhouse/condo

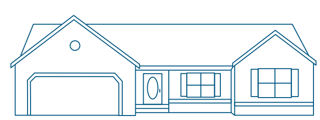
☐ Split level



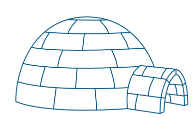
☐ Colonial

☐ Tudor

☐ Cape Cod



☐ Ranch



☐ Other?

Describe the ideal house you want to buy.

Someplace with a two-car garage? Someplace that will increase in value quickly?

Which neighborhoods are you interested in?

Rank in order of preference.

1 ______________________________

2 ______________________________

3 ______________________________

4 ______________________________

5 ______________________________

6 ______________________________

Do you have any must-haves?

Rank in order of preference.

1 ______________________________

2 ______________________________

3 ______________________________

4 ______________________________

5 ______________________________

6 ______________________________

Which of the following features do you want?

Number of Bedrooms: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ ______

Number of Bathrooms: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ ______

Approximate Square Footage: ______________________________

Indicate your preference for each feature below.

	Want	Need	Not important
Fireplace	☐	☐	☐
Dedicated parking or garage	☐	☐	☐
Deck	☐	☐	☐
Patio	☐	☐	☐
Central air	☐	☐	☐
Fenced-in yard	☐	☐	☐
Porch/sunroom	☐	☐	☐
Pool	☐	☐	☐
Shed	☐	☐	☐
Garden	☐	☐	☐
Hardwood floors	☐	☐	☐
Open concept	☐	☐	☐
Stone countertops	☐	☐	☐
Light-filled	☐	☐	☐
Lots of storage space	☐	☐	☐
Walkable neighborhood	☐	☐	☐
Close to parks	☐	☐	☐
Close to pool	☐	☐	☐
Close to public transportation	☐	☐	☐

Most important room or specialty room?
Rec room? Formal dining room? Work out room?

Anything else?

Section #4 | Finances

Objective: Get a handle on your financial situation.

How much do you currently spend on housing each month?

How much more or less do you want to spend once you buy?

How much of your monthly income are you planning to spend on your home?
Slightly important question.

- ☐ All of it. No, seriously. All of it.
- ☐ Most of it. As long as I have money left over for vacations and Netflix.
- ☐ Some of it. My home isn't the end-all-be-all of my life.
- ☐ A little of it. It's just a place to sleep.

How's your credit?
Better credit is better for you. But don't worry – there are options even if your credit isn't perfect.

- ☐ Exceptional 800+
- ☐ Very Good 740 to 799
- ☐ Good 670 to 739
- ☐ Below Average 580 to 669
- ☐ Poor 579 and lower

Have you been pre-approved for a mortgage yet?
Pre-approval shows your agent and the home sellers that you're serious!

- ☐ Yes, I have been pre-approved.
- ☐ No, I haven't been pre-approved.
- ☐ I need some help understanding pre-approval.

Section #5 | Your Outlook

Objective: Help your agent know how you're feeling, what you're confident about, and where you could use a little bit of help.

Which parts of the buying process are you particularly excited or nervous about?

Only the unbalanced are excited about the mortgage process. Just sayin'.

	Nervous	Neutral	Excited
Research	☐	☐	☐
Working with an agent	☐	☐	☐
Shopping online for homes	☐	☐	☐
Getting a loan	☐	☐	☐
Open houses	☐	☐	☐
Making an offer	☐	☐	☐
Moving in	☐	☐	☐

And we're done!

Now that you have a handle on what you're looking for and what you expect, it's time to interview and select a real estate agent who will help you get the home you want. Find out how at www.HouseLogic.com/buystepbystep.