

# 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.

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## 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.

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

### Any other reasons?

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### 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?

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

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

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## 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.**

<b>Co-Buyer</b> Will anybody be buying or co-signing with you? Your significant other? Your parents?	<b>Adviser</b> Who will be guiding you along the way?	<b>Co-Shopper</b> Who will be helping you pick the right place?	<b>Emotional/Texting Support</b> 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



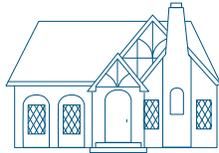
Townhouse/condo



Split level



Colonial



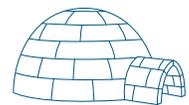
Tudor



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?

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### 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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dedicated parking or garage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deck	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Central air	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fenced-in yard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Porch/sunroom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pool	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Garden	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hardwood floors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open concept	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stone countertops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Light-filled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lots of storage space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walkable neighborhood	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Close to parks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Close to pool	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Close to public transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Most important room or specialty room?

Rec room? Formal dining room? Work out room?

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### Anything else?

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## 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?**

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### 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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working with an agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shopping online for homes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Getting a loan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open houses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Making an offer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Moving in	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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## 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](http://www.HouseLogic.com/buystepbystep).