ttArch
REAL ESTATE

BUYER CONSULTATION WORKSHEET

Start with clarity. Search with purpose.

Clarify your goals, preferred timeline, budget, lifestyle priorities, non-negotiables, and concerns before beginning your Denver home search.

USE THIS WORKBOOK TO

- Define what matters most
- Prepare for financing conversations
- Identify tradeoffs before touring
- Make your buyer consultation more productive

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A thoughtful home search begins before the first showing.

Complete what you can, leave uncertain items blank, and bring your questions to the consultation.

1. Your Buying Situation

Tell us where you are starting and what is creating the need or opportunity to buy now.

Buyer name(s)

Current address

Phone

Email

Preferred contact method

Current housing situation

TIMING AND LOGISTICS

Lease expiration date

Target move date

Ideal purchase date

Current home sale required?

YOUR CURRENT SITUATION

- [ ] First-time buyer
- [ ] Repeat buyer
- [ ] Relocating to Denver
- [ ] Buying before selling
- [ ] Selling before buying
- [ ] Purchasing an investment property
- [ ] Purchasing for a family member
- [ ] Other

What is driving this purchase now?

2. Goals and Priorities

Separate essential needs from preferences so the search can stay focused when real-world tradeoffs appear.

MUST HAVE Would not willingly compromise	STRONG PREFERENCE Important, but potentially flexible	NICE TO HAVE Desirable if budget and property allow

COMMON DECISION CRITERIA

Mark the items that are likely to shape your search.

- ☐ Price range
- ☐ Neighborhood
- ☐ Commute
- ☐ Home type
- ☐ Bedrooms
- ☐ Bathrooms
- ☐ Home office
- ☐ Yard or outdoor space
- ☐ Parking
- ☐ Schools
- ☐ Accessibility
- ☐ Renovation tolerance
- ☐ Age or architectural style
- ☐ HOA preference
- ☐ Transit access
- ☐ Parks and recreation
- ☐ Walkability
- ☐ Long-term resale

YOUR TOP THREE PRIORITIES

1.
2.
3.

3. Lifestyle and Neighborhood Fit

A neighborhood should support daily life, not only look appealing during a weekend showing.

Where do you spend most of your time during the week?

What commute would feel sustainable?

Do you prefer activity and convenience or quiet and privacy?

How important is proximity to family or friends?

How might your household needs change in the next five years?

How much home and yard maintenance are you comfortable managing?

RATE YOUR LIFESTYLE PRIORITIES

Choose one level for each consideration.

Consideration	Low	Moderate	High
Walkability	☐	☐	☐
Commute	☐	☐	☐
Schools	☐	☐	☐
Parks and trails	☐	☐	☐
Restaurants and retail	☐	☐	☐
Privacy	☐	☐	☐
Yard size	☐	☐	☐
Architectural character	☐	☐	☐
Low maintenance	☐	☐	☐
Future resale	☐	☐	☐

4. Budget and Financing Readiness

Use comfortable numbers, not only maximum numbers. Your approved amount may be higher than the budget that supports your broader goals.

Comfortable purchase range

Maximum purchase range

Comfortable monthly payment

Estimated down payment

Funds available for closing

Desired reserve after closing

Loan type under consideration

Lender selected?

Pre-approved?

Pre-approval amount

Pre-approval expiration

Expected proceeds from current home

FINANCIAL READINESS CHECK

- ☐ I understand estimated closing costs.
- ☐ I have considered property taxes and insurance.
- ☐ I have considered HOA dues.
- ☐ I have planned for maintenance and repairs.
- ☐ I have discussed possible rate changes with my lender.
- ☐ I understand that approval amount and comfortable budget may differ.

YOUR MAXIMUM APPROVED PRICE IS NOT NECESSARILY YOUR IDEAL PURCHASE PRICE.

Preserve room for repairs, savings, lifestyle, and the unexpected costs of ownership.

What monthly payment would allow you to remain financially comfortable?

5. Property Preferences and Tradeoffs

Identify the property types and condition levels you will consider, then think through the tradeoffs before a specific home creates pressure.

PREFERRED PROPERTY TYPES

- ☐ Detached single-family home
- ☐ Townhome
- ☐ Condominium
- ☐ Patio home
- ☐ New construction
- ☐ Historic or older home
- ☐ Fixer or renovation opportunity
- ☐ Multi-generational home
- ☐ Investment-compatible property

CONDITION PREFERENCE

- ☐ Move-in ready only
- ☐ Cosmetic work is acceptable
- ☐ Moderate renovation is acceptable
- ☐ Major renovation is acceptable
- ☐ Unsure

TRADEOFF QUESTIONS

Choose Yes, Maybe, or No based on your current thinking.

Question	Yes	Maybe	No
Would you choose a smaller home in a preferred neighborhood?	☐	☐	☐
Would you accept a longer commute for more space?	☐	☐	☐
Would you choose an older home for architectural character?	☐	☐	☐
Would you accept an HOA for lower maintenance?	☐	☐	☐
Would you purchase below your maximum budget to preserve renovation funds?	☐	☐	☐
Would you consider a home that does not meet every stated preference?	☐	☐	☐

6. Concerns, Questions, and Consultation Notes

Use this page to identify uncertainty, prior experiences, and the topics that would make the consultation most useful.

What concerns you most about buying a home?

What part of the process feels least clear?

Have you had a difficult prior real estate experience?

What would make you feel confident moving forward?

What would cause you to delay or stop the process?

What do you expect from your real estate professional?

QUESTIONS I WANT TO DISCUSS

1.
2.
3.
4.
5.
6.

TOPICS FOR THE CONSULTATION

- ☐ Representation and buyer agreements
- ☐ Financing and monthly cost
- ☐ Search strategy
- ☐ Offer strategy
- ☐ Closing costs
- ☐ Agent compensation
- ☐ Neighborhood selection
- ☐ Property evaluation
- ☐ Inspection and due diligence
- ☐ Timeline and next steps

Completing this worksheet does not commit you to purchasing a home or working with a particular professional. Its purpose is to make your consultation more focused, useful, and responsive to your goals.