



OPEN HOUSE AGENT INTERVIEW SHEET

Prepared by: Agent _____
Broker _____

Phone _____
Email _____

NOTE: The purpose of this form is to gather information about the property, seller and surrounding area to provide a basis for determining the price to be offered for the property.

DATE: _____, 20____, at _____, California.

Items left blank or unchecked are not applicable.

1. THE SELLER/OWNER/OCCUPANT (Mostly confidential information)

- 1.1 Reason for selling _____
- 1.2 Where relocating after the sale _____
- 1.3 When vacating the property _____
- 1.4 Profession/employment/employer _____
- 1.5 Nonprofessional relationship with agent, if any:
 - a. Relative; Social; Neighbor; Other _____
- 1.6 Member of what civic organizations _____
- 1.7 Marital status/family/location of other family members _____
- 1.8 Health condition _____
- 1.9 In litigation/any judgments? Describe _____
- 1.10 Other properties owned _____

2. THE PROPERTY

- 2.1 When acquired _____, 20_____.
- 2.2 Age of property _____.
- 2.3 Specifications: sq feet _____; lot size _____; bedrooms _____; bathrooms _____; roof (type) _____; exterior _____; patio(s) _____; garage/parking _____; type of construction _____; landfill _____; landscaping/fence _____
- 2.4 Components replaced/upgraded (roof/kitchen/bath, etc.) _____
 - a. When installed _____, 20_____.
 - b. Condition of improvements _____
- 2.5 Hazard insurance claim within five years? Yes; No. _____
- 2.6 City certifications, retrofitting/ordinance compliance _____
- 2.7 Zoning/uses _____
 - a. Casita/Granny Flat permitted? Yes; No.
- 2.8 Service providers for the property (utilities, maintenance companies) _____

- 2.9 Marketing package on the property contents. Received? Yes; No.
 - a. Contents of marketing package _____
- 2.10 Hazards: NHD disclosure. Yes; No. Contents _____
- 2.11 Property condition: TDS disclosure. Yes; No. Contents _____
- 2.12 Termite/other reports. Yes; No. Contents _____
 - a. Clearance? Box Yes; No. Contents _____
- 2.13 Property operating costs: APOD. Yes; No. Contents _____
- 2.14 Security, crime at or around property _____
 - a. Neighborhood watch? Yes; No.
- 2.15 MLS printout of property. Yes; No. Contents _____
- 2.16 Title profile obtained. Available? Yes; No. Contents _____
 - a. Who is the Owner vested on title _____
- 2.17 Mello-Roos bonds Yes; No. Amount \$_____ (monthly).
- 2.18 Rental value \$_____. Address(es) of comps used _____
- 2.19 Is property located in a common interest development (CID)? Yes; No.
 - a. Homeowners' Association (HOA) fees \$_____ (monthly).
 - b. Date of last special assessment and dollar amount \$_____.
 - c. Next special assessment anticipated _____, 20_____.
 - d. Any litigation? Explain _____

3. LOCATION/NEIGHBORHOOD

- 3.1 Description of the property's neighborhood _____
- 3.2 Traffic/closest bus route/stop _____
 - a. Street map available? Yes; No.
- 3.3 Non-single family residential (SFR) zoning nearby _____
 - a. Zoning map available? Yes; No.
- 3.4 Noise (produced by neighbors at night/ground or airborne sources) _____
- 3.5 Area amenities:
 - a. Schools _____
 - b. Shopping _____
 - c. Banks _____
 - d. Business offices _____
 - e. Proximity to industrial property _____
 - f. Area map available? Yes; No.

- 3.6 Number of homes of equal value in neighborhood _____
- 3.7 Number of homes of greater value in neighborhood _____
- 3.8 Number of homes of lesser value in neighborhood _____

4. THIRD PARTIES WITH KNOWLEDGE OF PROPERTY

- 4.1 Prior offers to buy? Yes; No. Price \$_____.

 - a. Why offer unacceptable/no sale _____

- 4.2 Have other agents viewed the property? Yes; No.

 - a. What did they say about the property/price _____
 - _____
 - b. Name/contact information of other agents _____
 - _____

- 4.3 Have neighbors visited the property/open house? Yes; No.

 - a. What did they say about the property/price? _____
 - _____
 - b. Name/contact information of neighbors with most knowledge of neighborhood _____
 - _____

- 4.4 Police information on neighborhood security _____

 - a. Nearest police (sub)station _____

- 4.5 Transients/foot and street traffic in neighborhood _____
- 4.6 Are there any notoriously difficult neighbors in this neighborhood? Yes; No.

 - a. Name/address of difficult neighbor(s) _____
 - _____

5. TERMS OF SALE

- 5.1 Listing price \$_____. Was price reduced? Yes; No. When _____, 20_____.
- 5.2 Sale price expected \$_____. Fair market value (FMV) \$_____. Price paid \$_____.

 - a. How set _____
 - b. Comps and Comparative Market Analysis (CMA) report _____
 - _____
 - c. Personal property included with the sale (appliances, furniture, etc.) _____
 - _____
 - d. Minimum down payment expected \$_____.

- 5.3 Existing financing:

 - a. Financing now encumbering property \$_____. Interest rate _____%.
 - b. Date financing recorded _____, 20_____.
 - c. Monthly payment \$_____. Includes: Mortgage Insurance Premium (MIP)/Private Mortgage Insurance (PMI); Impounds.
 - d. Conventional; Federal Housing Administration (FHA).
 - e. Is the loan assumable? Yes; No. Charges \$_____.
 - f. Will Seller carryback a note and trust deed? Yes; No. Terms _____
 - _____

- 5.4 New financing:

 - a. Will Seller accept an FHA-insured loan contingency? Yes; No.
 - b. Will Seller require Buyer to be preapproved? Yes; No. Documentation required _____
 - _____
 - c. Seller will pay _____% of Buyer's closing costs (recurring/nonrecurring).
 - d. Other price concessions Seller will agree to for replacement of components (cashback/credit for painting, flooring, obsolete appliances, etc.) _____
 - _____

6. MISCELLANEOUS

- 6.1 Tenant in occupancy? Yes; No. Name _____
 - a. Is there a rental/lease agreement? Yes; No. Expiration _____, 20_____.
 - b. When vacating? On close of escrow; or _____, 20_____.
- 6.2 Name of the listing agent _____
 - a. Name of the Open House agent if not Listing Agent _____
- 6.3 The open house agent is working independently; part of a team.
 - a. The team/team leader is _____
- 6.4 Any problems working with the Buyer's Agent? _____
- 6.5 How is the open house agent being paid? _____

Date: _____, 20_____

By: _____