

REAL ESTATE CLIENT INTAKE FORM TEMPLATE

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DATE

TENDING REALTOR

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CLIENT INFORMATION

NAME		CURRENT ADDRESS	
DATE OF BIRTH			
SOCIAL SECURITY NUMBER			
HOME PHONE		FAX	
ALT. PHONE		EMAIL	
CONTRACT ACCEPTANCE DATE			

PROPERTY INFORMATION

PROPERTY ADDRESS			
COUNTY		BOROUGH	
MARKET PRICE		COSTS PAID BY SELLER	
SALE PRICE		HAND MONEY	
CLOSING DATE			

Describe work to be done contingent upon sale:

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SELLER'S AGENT

NAME	
COMPANY	
ADDRESS	
PHONE	
FAX	

BUYER'S AGENT

NAME	
COMPANY	
ADDRESS	
PHONE	
FAX	

MORTGAGE BROKER

COMPANY NAME		APPROVAL AMOUNT	
LOAN OFFICER		LOAN AMOUNT	
PHONE			

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