



CLIENT PROFILE INFORMATION SHEET

GENERAL INFORMATION

Date:	Referred By:	
First Name:	Last Name:	
Co-Contact:		
Address:	City:	Zip:

IMPORTANT NUMBERS

HIS	HERS
Home:	
Work:	
Cell:	
Fax:	
E-Mail:	
Website:	
Best Way To Reach You:	

BUSINESS INFORMATION

HIS	HERS	
Company:		
Title:		
Address:		
City:		
Zip:		
Receive Deliveries?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

SPECIAL OCCASIONS

Family Birthdays:	His:	Hers:
Child:	Date:	<input type="checkbox"/> Boy <input type="checkbox"/> Girl
Child:	Date:	<input type="checkbox"/> Boy <input type="checkbox"/> Girl
Child:	Date:	<input type="checkbox"/> Boy <input type="checkbox"/> Girl
Child:	Date:	<input type="checkbox"/> Boy <input type="checkbox"/> Girl
Wedding Anniversary:		
Other Important Dates:		

Neighborly Team

Exceeding Expectations



What Is Important To You?

Client: _____

Date: _____

Loan Clarity

Loan Officer: _____

Company: _____

Loan Type: _____

Loan Program: _____

Price Range: _____

Interest Rate: _____

Monthly Payments? _____

What is your down payment? _____

Closing Cost? _____

Common costs prior to close: _____

What are you looking for in a perfect home?

Location: _____

Type: _____

Bedrooms: _____

Pool/Spa: _____

Bathrooms: _____

Fireplace: _____

Square Feet: _____

Age: _____

RV Access: _____

Stories: _____

Garage: _____

Roof: _____

Other Details: _____

MLS Search Parameters

Area(s): _____

Price Range: _____

Square Footage: _____

Bedrooms/baths: _____

Email 1: _____

Email 2: _____

Other: _____



Achieving Your Goals

And Getting You The Best Value

Our mission **within the Neighborhoodly Team** is to help you achieve your goals and at the same time exceed your expectations. We want to help you become a very informed buyer so we are going to discuss the following:

Your Home parameters

- Location-why?
- Desired specifications

Searching for the home

- MLS-Prospector vs. all other media venues
- New vs. resale
- Preview exterior, neighborhoods, cars parked in the street, power lines, RR tracks, apartments, and backing up to busy roads
- Bring your checkbook-earnest deposit every time we look at properties

Writing the offer

- Comps-paying a fair price
- Understanding terms
- Negotiating

Disclosures

- Transfer disclosure statement
- Talk with your future neighbors
- Check on-line for sexual offenders
- Call the Sheriffs Department

Inspections

- Pest-Section 1 & Section 2
- Whole House Inspections-Bring a check (\$225-\$600 paid at time of inspection)
- Other inspections

Home Maintenance

- Pest inspections – every two years
- Home inspections – every three years

Creating A Win/Win

- Clarifying expectations

The above information was reviewed in detail with me:

Signature

Date

Signature

Date

Neighborly Team

Exceeding Expectations



Win/Win With The Neighborly Team

Client: _____ Date: _____

1. Why are you purchasing a home now? _____

2. In order for us to meet or exceed your expectations, I need to understand what you expect this process to be. I want you to describe the “perfect” process and service.

Honesty: (None) 1 2 3 4 5 6 7 8 9 10 (Brutal)

3. Outside of the opposite of what you just described to me, what really urks you? What just sets off your buttons? In other words, what do we not want to do with you?

4. Aside from all we’ve talked about, are there any other expectations you have from us that I should know about?

5. What do you feel we have the right to expect from you?

Neighborhoodly Team

Exceeding Expectations



Preferred Buyer Agreement

We Will Provide You With The Following Services:

1. We will arrange a free, no-obligation pre-qualification meeting for you with a loan officer to find out now exactly how much you are qualified to borrow. With your permission, we will speak directly to your loan officer to become clear with your loan and financing terms and check in with them, on your behalf, prior to writing an offer to be certain no terms have changed.
2. We will search the Multiple Listing System for all homes listed by all real estate companies to make sure you know about every resale.
3. We will arrange private showings for any and all homes you wish to see or arrange to meet with you at new home subdivisions in the areas of your choice.
4. We can help you with the negotiations and purchase of any “for-sale-by-owner” home as long as the owner will cooperate with real estate agents.
5. When you find the right resale home or new home, we will assist you with preparing an offer that is in your best interest.
6. We will discuss in detail, strategies about your offer price, financing terms, interest rate and possession date. We will also consult with your loan officer to apprise him/her of your offer and to make sure there will be no problems in securing your loan and getting an approximate possession date.
7. We will present the offer on your behalf to the seller, the new home subdivision, the for-sale-by-owner or the seller’s agent. We will negotiate in your interest at all times to get you the best deal possible.
8. We will recommend the best services: whole house inspection, appraisal, home warranty, title insurance, etc.
9. We will obtain answers to any and all questions you may have.
10. We will work hard to ensure you receive exceptional service from everyone involved with your new home purchase.
11. If within 30 days after purchasing a home from us you are not 100% satisfied, we will resell it for you at no cost for our services. You must agree to sign our Resale Guarantee.

Neighborhoodly Team

Exceeding Expectations



Preferred Buyer Agreement

You Agree To:

1. Immediately seek pre-approval from a loan officer if your pre-qualification goes well. You will provide us with a copy of your pre-approval letter as soon as you qualify.
2. Notify us of any listed homes you wish to inspect.
3. Should you be interested in previewing any new home subdivisions, you agree to always go with one of **the Neighborhoodly Team members.**
4. Inform for-sale-by-owners and any other real estate agents that you are working with **the Neighborhoodly Team.**
5. Make any offer on any resale home or new home subdivision through us.
6. You are under no obligation to buy or build a home.
7. For all these services, you owe us nothing. The new home subdivision or seller on any home that you purchase will pay our fee.
8. If you buy a home from another real estate firm, for sale by owner or new subdivision without using us, then you agree to pay a fee of \$950 for the time, effort and services expended by us on your behalf.
9. If at anytime during this process you are not 100% satisfied with our services, you may cancel this contract by sending us written notification.
10. This agreement expires _____.

Buyer's Signature: _____ Date: _____

Buyer's Signature: _____ Date: _____

Agent's Signature: _____ Date: _____

Neighborhoodly Team

Exceeding Expectations



Resale Guarantee

If you obtain a home through The **Neighborhoodly Team** and you are not 100% pleased with it, The **Neighborhoodly Team** will sell it for you with no charge for their services.

The following conditions must be met:

1. You must have purchased your home through The **Neighborhoodly Team**
2. You sign an exclusive right to sell listing agreement with The **Neighborhoodly Team** within 1 month of the day that you originally purchased the home.
3. You agree to have your home listed in the Multiple Listing Service (MLS) and you agree to pay a commission of at least 3% of the sales price to the selling agent. The **Neighborhoodly Team** services for listing the home will be TOTALLY FREE.
4. You agree to list the home at a list price that is no more than 3% above the appraised value.
5. You agree to make all repairs recommended by The **Neighborhoodly Team** prior to putting your home on the market.
6. You agree to install a lockbox for ease of showing.
7. If you purchase a new home within one year of selling your current one, then you agree to use The **Neighborhoodly Team** exclusively to obtain the new home. Further, you agree to sign a new Preferred Buyer Agreement with The **Neighborhoodly Team** at the same time you sign the listing agreement to sell your current home.
8. This agreement must be signed by all parties.

Buyer's Signature: _____ Date: _____

Buyer's Signature: _____ Date: _____

Agent's Signature: _____ Date: _____

Neighborhood Team

Exceeding Expectations



The Importance Of A Home Inspection

Why Should You Obtain One?

As a prospective homebuyer are you sophisticated in identifying problem areas in your potential new home? Most of us are not knowledgeable in identifying potential problem areas. You are in the process of making a very large investment, maybe the largest investment you will ever make. For just a small investment now you may save substantial money in the future. It is very difficult for a buyer or the agent representing them to pick-up any potential problems in a visual walk-through. Can you afford to not have a professional home inspector survey the premises for the integrity of the internal and external components of the dwelling?

Here are a few areas Home Inspectors look at:

Structural

Many home inspection organizations have set standards on certain areas of the home the home inspector looks at to determine the integrity of the essential internal and external structural components. Home inspectors are not structural engineers but can identify visual defects in these areas requiring immediate repairs.

Electrical

Do all the outlets work? Does the house use fuses or is there a breaker box? Are there any visible signs of fraying on the wiring?

Plumbing

Are there any leaks or annoying drips? Are all the mechanical systems and fixtures working properly?

Built-In Appliances?

Are they functioning properly?

Safety Hazards

Home inspectors are not environmental specialists, but they can identify many safety hazards or dangerous conditions.

Miscellaneous

Other items may or may not be included in a standard home inspection. Some of these may be: septic systems, roofs, drainage problems, wood decks, patios or other exterior structures. Be sure and verify which, if any, of these items are included in your home inspection.

Neighborly Team

Exceeding Expectations



The Importance Of A Home Inspection (continued)

Why Should You Obtain One?

Normally Not Included:

Termite, geological or land subsidence surveys and environmental or pollution inspections which should be completed separately for your own protection. Home inspectors provide a unique customer service in identifying existing problems, should there be any and assisting in promoting and facilitating communication with the home seller. There are many home inspection companies to choose from.

Keller Williams and The Neighborly Team strongly recommend all buyers to order a home inspection by a property inspection company.

Listed below are three home/property inspection companies that we recommend:

Name Of Company	Contact	Phone Number
1. West Home Inspections	Randy West	916-773-6585
2. Capitol City Home Inspections	Doug Dodd	916-483-2113
3. Integrity Inspection Services	Mark Jones	916 786-3447

Keller Williams and your agents The **Neighborly Team** cannot guarantee or warrant the accuracy of any inspection report that may be generated. You are under no obligation to use the inspectors listed above; they are recommendations only.

Buyer(s) AGREE(S) to order home inspection

Buyer(s) WAIVE(S) a home inspection

Signature: _____

Signature: _____

Signature: _____

Signature: _____

Date: _____

Date: _____



BUYER'S ELECTION OF INSPECTIONS TO BE PERFORMED

(Note: Each numbered paragraph must be checked)

Pursuant to the Real Estate Contact and Receipt for Deposit covering the property at:

_____, CA, the following terms and conditions are incorporated by reference and the following list of inspections to be performed are made a part thereof. Buyers reserve the right to have these or other inspections DURING THE TIME LIMIT set forth in the contract. KELLER WILLIAMS RELATY, it's agents and brokers, strongly recommend the Buyer(s) satisfy themselves as to the physical condition of the above property. The following inspections IN ADDITION TO A PEST INSPECTION are TYPICAL in _____ County.

- 1. **Home inspection Services**—This inspection is intended to reveal the general condition of the property; structural, foundation, electrical, plumbing, and other conditions of the subject property.
Buyer(s) WILL ___ WILL NOT ___ be ordering a physical inspection.....Est. Cost \$250-500
- 2. **Roof Inspection**—This inspection is intended to reveal the present condition of the roof, evidence of past or current leaks and the approximate retaining life of the roof. A guarantee of life expectancy is NOT INCLUDED.
Buyer(s) WILL ___ WILL NOT ___ be ordering a roof inspection.....Est. Cost \$0-100
- 3. **Environmental Inspection Report**—In addition to reading the "Environmental Hazard: Guide for Homeowners and Buyers" booklet, Buyer(s) can order an environmental inspection report by an expert. This Inspection may reveal conditions, which may be hazardous to human health.
Buyer(s) WILL ___ WILL NOT ___ be ordering an environmental report.....Est. Cost \$175-1,000
- 4. **Pool Inspection**—This inspection is intended to reveal the condition of the pool, spa and related systems.
Buyer(s) WILL ___ WILL NOT ___ be ordering a pool inspection.....Est. Cost \$75-200
- 5. **Appliance Inspection**—this inspection is intended to reveal problems with the oven, range, dishwasher and smaller built-in appliances.
Buyer(s) WILL ___ WILL NOT ___ be ordering a appliance inspection.....Est. Cost \$35-150
- 6. **Heater/Air Conditioning Inspection**—This inspection is intended to reveal problems with the heating and sir conditioning units.
Buyer(s) WILL ___ WILL NOT ___ be ordering a Heat/AC inspection.....Est. Cost \$50-150
- 7. **Solar Water Heater, Panels or Similar Inspection**-This inspection is intended to reveal problems with the solar system or similar units.
Buyer(s) WILL ___ WILL NOT ___ be ordering a solar heater inspection.....Est. Cost \$40-150
- 8. **Fireplace/Chimney Inspection**—this inspection is intended to reveal the structural condition of the exterior or interior aspects of the fireplace; safety condition or the interior or flue sections including chimney caps and spark arresters.
Buyer(s) WILL ___ WILL NOT ___ be ordering a fireplace inspection.....Est. Cost \$50-150
- 9. **Rural Property Inspection in Addition to 1 through 8:**
 - a. **Well and Pump Inspection**—THIS LIMITED inspection is intended to reveal the general condition of the well and the portability of the water.
Buyer(s) WILL ___ WILL NOT ___ be ordering a well/pump inspection.....Est. Cost \$90-120
 - b. **Septic System Inspection**—This inspection reveals the condition of the septic tank and leach lines.
Buyer(s) WILL ___ WILL NOT ___ be ordering a septic system inspection.
- 10. **Other inspections requested by Buyer:** _____

Est. Cost \$ _____

INSPECTIONS ARE NOT A GUARANTEE OR WARRANTY OF FUTURE SERVICE ABILITY. INSPECTIONS MAY ALSO REVEAL CONDITIONS, WHICH COULD LEAD TO FUTURE PROBLEMS.

Buyer's initials: _____

The cost for the above inspection(s) is the responsibility of the party ordering the inspection, not the Agent(s) or the Broker(s). Buyer and seller authorize payments for the above inspections to be paid in escrow or, in the event the transaction does not close, to be deducted from the buyer's deposit with the balance of the deposit processed according to the terms of the contract.

BUYER: _____ DATE: _____

BUYER: _____ DATE: _____

Buyer Forms Checklist

Must be included in all offers

- AD - Disclosure Regarding Agency
 - RPA - Residential Purchase Agreement
 - Copy of deposit check
 - WPA – Wood Destroying Pest Inspection
 - SBSA – Statewide Buyers & Sellers Advisory
 - Letter to seller about buyer
 - Pre-approval letter
 - Commission verification: make a copy of the MLS sheet on the day of writing the offer and highlight the commission
-

Potentially Need Forms

- COP - Contingency For Sale of or Purchase of Other Property
- PAA-1 - Purchase Agreement Addendum



CALIFORNIA
ASSOCIATION
OF REALTORS®

**NOTICE OF YOUR "SUPPLEMENTAL"
PROPERTY TAX BILL**
(C.A.R. Form SPT, 10/05)

Name of Buyer(s) _____

Property Address _____

Pursuant to Civil Code §1102.6c, Seller or his or her agent is providing this "Notice of Your 'Supplemental' Property Tax Bill":

"California property tax law requires the Assessor to revalue real property at the time the ownership of the property changes. Because of this law, you may receive one or two supplemental tax bills, depending on when your loan closes.

The supplemental tax bills are not mailed to your lender. If you have arranged for your property tax payments to be paid through an impound account, the supplemental tax bills will not be paid by your lender. It is your responsibility to pay these supplemental bills directly to the Tax Collector.

If you have any questions concerning this matter, please call your local Tax Collector's Office."

Buyer acknowledges Buyer has read, understands and has received a copy of this "Notice of Your 'Supplemental' Property Tax Bill".

Buyer _____ Date _____

Buyer _____ Date _____

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Reviewed by _____ Date _____





Pest and Termite Inspection Definitions

Definitions of Section I, Section II and Further Inspection on a California Wood Destroying Organism (Pest) Report

Section I:

Contains items where there is visible evidence of active infestation, infection. Or conditions that have resulted in or from infestation of infection. (i.e. fungus, and dry rot, subterranean dry wood termites, damp wood termites, wood boring beetles, carpenter ants and carpenter bees.

Section II:

Conditions deemed likely to lead to infestation or infection but where no visible evidence of such is found. (i.e. earth to wood contact, cellulose debris, excessive moisture due to plumbing, sprinkler, roof leaks or faulty grades.

Further Inspection:

Recommendations to inspect area(s), which during the original inspection, did not allow the inspector access to complete the inspection and cannot be defined. This would apply to areas(s) where the inspector cannot see but suspects damage and must be opened up to inspect thoroughly. This would apply, but would not be limited, areas with low clearance (such as a sub area), garages with excessive storage or noted water stains.



Chapter VI

Mold

What are molds?

Molds are simple, microscopic organisms, present virtually everywhere, indoors and outdoors. Molds, along with mushrooms and yeasts, are fungi and are needed to break down dead material and recycle nutrients in the environment. For molds to grow and reproduce, they need only a food source – any organic material, such as leaves, wood, paper, or dirt— and moisture. Because molds grow by digesting the organic material, they gradually destroy whatever they grow on. Sometimes, new molds grow on old mold colonies. Mold growth on surfaces can often be seen in the form of discoloration, frequently green, grey, brown or black but also white and other colors. Molds release countless tiny, lightweight spores, which travel through the air.

How am I exposed to indoor molds?

Everyone is exposed to some mold on a daily basis without evident harm. It is common to find mold spores in the air inside homes, and most of the airborne spores found indoors come from outdoor sources. Mold spores primarily cause health problems when they are present in large numbers and people inhale many of them. This occurs primarily when there is active mold growth within home, office or school where people live or work. People can also be exposed to mold by touching contaminated materials and by eating contaminated foods. Molds will grow and multiply whenever conditions are right—sufficient moisture is available and organic material is present. The following are common sources of indoor moisture that may lead to mold problems:

- Flooding
- Leaky roofs
- Sprinkler spray hitting the house
- Plumbing leaks
- Overflow from sinks or sewers
- Damp basement or crawl space
- Steam from shower or cooking
- Humidifiers
- Wet clothes drying indoors or clothes dryers exhausting indoors

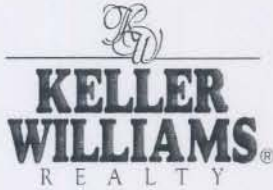
Warping floors and discoloration of walls and ceilings can be indications of moisture problems. Condensation on windows or walls is also an important indication, but it can sometimes be caused by an indoor combustion problem! Have fuel-burning appliances routinely inspected by your local utility or a professional heating contractor.

Should I be concerned about mold in my home?

Yes, if indoor mold contamination is extensive, it can cause very high and persistent airborne spore exposures. Persons exposed to high spore levels can become sensitized and develop allergies to the mold or other health problems. Mold growth can damage your furnishings, such as carpets, sofas and cabinets. Clothes and shoes in damp closets can become soiled. In time, unchecked mold growth can cause serious damage to the structural elements in your home.

Seller _____ Date _____ Buyer _____ Date _____

Seller _____ Date _____ Buyer _____ Date _____



MOLD DISCLOSURE

In recent months there has been a great deal of publicity regarding the existence of toxic mold in homes, apartments and commercial buildings. Current information indicates that certain types of mold may cause severe health problems for some individuals.

Not all molds are detectable by a visual inspection by a Realtor or even a professional whole house inspector. It is also possible that the property could have hidden mold that all seller is not aware of.

The only way to provide a reasonable assurance that the property does not have a mold or health hazard problem is to retain the services of an environmental expert who will conduct specific tests. Normally, these tests will consist of an interior and exterior examination for airborne spores and a carpet test, but other procedures may be necessary. Any visible mold should be professionally evaluated.

Broker advises that buyers should consider having a specific mold test performed by an environmental professional as either a separate test or an add-on to their whole house inspection. This is especially necessary if any of the inspection reports or disclosure documents indicate that there is evidence of past or present moisture, standing water or water intrusion at the property, since most molds thrive on moisture.

All inspections, including those to detect mold, should be completed within the inspection period established in the purchase contract. **Any waiver or failure on the part of a buyer to complete and obtain all appropriate tests, including those for mold, is against the advise of the Broker.**

Broker has not and cannot verify whether or not there is any health hazard with the property:

Property Address: _____
City: _____ State: _____ Zip: _____

Buyer: _____ Date: _____

Buyer: _____ Date: _____

Seller: _____ Date: _____

Seller: _____ Date: _____

CONSUMER INFORMATION ACKNOWLEDGEMENT

To Whom It May Concern:

I, the undersigned, acknowledge receipt of the booklet, "A Guide for Homeowners", from the Broker(s) in this transaction which is a combination of the following publicly available documents:

- I. The State of California Environmental Protection Agency "**Residential Environmental Hazards: A Guide for Homeowners, Homebuyers, Landlords and Tenants**" and includes Chapter VI Toxic Mold.
- II. "**Protect Your Family From Lead In Your Home**" booklet provided by USEPA.
- III. The California Seismic Safety Commission "**Homeowner's Guide to Earthquake Safety**", July 2005 edition, including the natural gas safety update.

Property Address: _____	
Date: _____	Time: _____
Buyer/Seller Signature: _____	Buyer/Seller Printed Name: _____
Selling Broker: _____	Listing Broker: _____
Selling Agent: _____	Listing Agent: _____

Property Address: _____	
Date: _____	Time: _____
Buyer/Seller Signature: _____	Buyer/Seller Printed Name: _____
Selling Broker: _____	Listing Broker: _____
Selling Agent: _____	Listing Agent: _____



Pet Disclosure

Property Address _____

Seller **does have** animals/pets on the property

Indoor pet(s) Type _____

Outdoor pet(s) Type _____

Indoor/outdoor pets(s) Type _____

Seller **does not have** animals/pets on the property

Seller(s) hereby disclose they and/or their tenants now own or have owned animals/pet(s) while residing in the subject property. These animal/pet(s) may or may not have damaged areas of the home. Buyers are advised to satisfy themselves as to the condition of the floor coverings within _____ days of acceptance of the Purchase Contract. Buyer(s) and Seller(s) acknowledge the listing and selling Brokers cannot guarantee the condition of the floor coverings nor compel Seller(s) compliance with this provision.

If household pets are located on the property or if previous owners have maintained animals as pets on the property, there may be odors or stains in the property as a result of the animals or pets. Stains made by animals or pets are not always detectible by a visual inspection. Moreover, a termite or physical inspection may not detect such stains as they may be in the floor covering beneath carpeted areas, hardwood floors, linoleum or other floor covering materials. In the event none of the inspections performed by the buyer on the property disclose any animal stains and/or odors on the property, Buyer is assuming the risk that such stains and/or odor exists and may become apparent in the future.

Seller _____ Date _____

Seller _____ Date _____

Buyer _____ Date _____

Buyer _____ Date _____
