

Creative Finance Real Estate Mini-App

Team Member: _____ Contact Date: _____ Time: _____
Contact Type: _____ Source: _____ Other: _____
Prospect URL: _____

(***Introduce yourself*** and explain who we are what we do)
Hello, my name is _____ I'm calling about your property for sale.

Contact Name: _____ Phone: _____ Type: _____
Email: _____ Phone: _____ Type: _____
Call Back Date: _____ Time: _____
CB Notes: _____
Why are you selling? _____ (Sales Reason Notes Below)

Distress:

Motivation:

Flexibility:

Address: _____
City: _____ State: _____ Zip: _____
County: _____ APN#: _____
Property Type: _____ Other: _____
Beds: _____ Baths (full): _____ Baths (Partial): _____
Yr.Built: _____ Sq Ft: _____ Lot Size: _____ Parking Type: _____ # Spaces: _____
Amenities: Pool Spa Gym Patio Porch Deck Hm.Ofc Casita
Other: _____

Are you currently living in the property? Yes No **Is it vacant?** Yes No

Owner status: _____ Other: _____

Property Usage: _____ Other: _____

Occ. Notes: _____

Condition (Grade): _____ **Repairs needed?** Yes No **Repair Estimates:** _____

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Is it Listed? Yes No **Months Listed:** Agency:
 Agent Name: Phone:
Asking Price: **Price Reason:**
 Appraisal Date: Appraised Value: **Comp. Value**
 Purch. Date: Purchase Price: Equity:
 Purch. Method: Other:
Current Rent: **Rent Comp(RentOMeter.com):**

Primary Person on Title:

Secondary Person on Title:

1st Mgt Co: Type: Balance: Pmt:
 2nd Mgt Co: Type: Balance: Pmt:
 An. Property Taxes: Inc.Mgt.Pmt? Yes No
 An. Insurance: Inc.Mgt.Pmt? Yes No

Are you currently employed? Yes No **Spouse Employed?** Yes No **Retired?** Yes No

Are you behind on Mortgage payments? Yes No Mos.: Amt:

Are you behind on HOA payments? Yes No Mos.: Amt:

Is a Trustee Sale pending? Yes No **Sale Date:**

Trustee Name: Phone:
 Address: City: State: Zip:

Any Bankruptcies? Yes No **Type:** **Discharge Date:**

Notes:

Expenses (Monthly) HOA: HOA Name:
 Elec.Low: Elec. High: Gas Low: Gas High:
 Water: Sewer: Trash:
 Other: Amt: Other: Amt:

NOTES: