

TERRA FIRMA GLOBAL PARTNERS

# Sue Bonzell

WWW.SUEBONZELL.COM

Sue's natural spirit for and experience in hospitality and marketing means she knows how to provide just the right experience for each one of her different clients. Sue's respectful and sincere nature shines through in each and every transaction she gets to be a part of.

Her easy and down-to-earth nature was likely derived from her upbringing on a local Sebastopol apple farm where her family worked hard in this small farming community. She was a 4-H member for many years, raising lambs and learning about sewing and cooking. She spent many years serving as an officer for the Active 20-30 Club where she was voted a Past Active Life Member. These leadership experiences have contributed to her direct communication style and how she gets things done with a high level of resourcefulness and attention to detail.

Sue has a Bachelor of Science degree in graphic design from Cal Poly San Luis Obispo and translated her natural people skills, design training and a head for business into her own design and marketing company where for nearly 20 years, she served a variety of business clients to achieve measurable results utilizing innovative marketing and social media strategies. Her very broad network in Sonoma County has served her well and her promotional efforts are stellar.

Sue has a passion for our area and the high-level hospitality service that goes with it, so she trained to become a Certified Tourism Ambassador for Sonoma County. As a natural promoter, she landed in local radio as a hobby, where she continues to promote all things Sonoma County. She serves as the Vice Chair on the Sebastopol Council of Realtors and on the Executive Leadership Team for the American Heart Association Sonoma County Chapter.

As a second generation Realtor®, Sue naturally gleaned real estate acumen and skills from her mother, Barbara Paul who has been in real estate for more than 20 years. Sue was recently voted Best Real Estate Agent in the Press Democrat and she feels honored to do the work she does with tenacity and she enjoys bringing a whole lot of fun to her work!







### A REAL ESTATE COMPANY FOR LIFE

**Leadership** \ Terra Firma Global Partners was founded in 2010 by Heidi Rickerd-Rizzo and Bill Facendini, two lifelong North Bay residents who have owned, managed and led major real estate organizations throughout the greater San Francisco Bay Area. They are known as innovators and have a passion for raising the bar in the industry.

Innovation \ We understand the ebb and flow of the real estate market, we recognize that a successful business is built on long standing relationships and we embrace the latest and best technology in order to serve our clients more effectively.

Commitment \ We have made a conscience decision not to be a large organization and have built the company on personal and business relationships that maintain the highest level of trust and integrity. To achieve excellence every team member must provide our clients with a personal experience that will keep them a client for life and give them trust and confidence to refer family and friends to us.

WE START WITH
THE FOCUS
ON THE CLIENT
AND END WITH
THE FOCUS
ON THE CLIENT.

**Knowledge** \ We seek expert understanding in all aspects of real estate and business and never stop educating ourselves. We believe the quality of the professional serving our clients will be the difference between satisfactory and superior performance.

**Communication** \ Our objective is to listen and understand what you want to accomplish, offer professional guidance by discussing all of the alternatives to reaching the goal and in the end establish and implement a plan to achieve success that is specific to your situation.



### **ENGAGE WITH US ONLINE**

### TERRAFIRMAGLOBALPARTNERS.COM

The Terra Firma website was designed with you in mind. We have addressed questions related to buying and selling real estate, mortgage rates, and the search for your new property to offer one solution for all of your needs. And, if we do not have it, we will get any information you are looking for!

**Resources** \ Whether buying or selling, discover information to help you understand the process, real estate news and current mortgage information.

**Our Communities** \ Terra Firma takes pride in the communities we live in. Discover and explore Marin, Sonoma and Napa counties and their communities. Gather information about area schools, transportation, outdoor activities and how our agents give back within these communities they work in.

**Property Search & Featured Listings**\ Perform property searches and watch property videos from the comfort of your home. Search for properties on our site and create an account to save your properties and searches, and have new properties emailed to you!

**Our Associates** \ Learn more about our team! Read more about our associates and the counties they serve to find the perfect associate to support you in your next real estate transaction.

**News & Updates** \ Stay up to date on community and real estate related news.

### **SOCIAL MEDIA**



#### FACEBOOK.

follow and engage with us. facebook.com/TerraFirmaGlobalPartners



#### YOU TUBE.

subscribe to our channel. youtube.com/user/TerraFirmaRealEstate



#### LINKED IN.

follow us and comment on our services. linkedin.com/companies/terra-firma-global-partners



#### PINTEREST.

follow our boards and pins. pinterest.com/tfgprealestate/



#### TWITTER.

receive our tweets.
twitter.com/tfgprealestate



#### YELP!

read and write review about our services. yelp.com/biz/terra-firma-global-partnerssebastopol



### Sequence of Events: Buyer Representation

### Finding the Home & Getting Prepared for the Offer Process - Consultant

- □ Work with Buyer to determine Buyer needs, wants, timeframe, and financial options
- □ Consultant and Buyer sign Agency Disclosure and Buyer-Broker Agreement
- Work with Buyer to secure loan pre-approval
- Set up systems to automatically alert Agent and Buyer to prospective properties coming on market that match Buyer's parameters
- Identify and preview property, attend property network meetings
- □ Provide resources for neighborhood and community information
- □ Consultant and Buyer tour properties: via appointment tours, broker tours, open houses
- Review benefits and drawbacks of properties with the Buyer
- Property is identified that Buyer wants to purchase

### Preparing, Writing & Presenting the Offer

- Review with Buyer the purchase, mortgage, closing and ongoing ownership costs pertinent to selected property
- Procure and review property disclosure package from Listing Agent and provide to Buyer for Buyer's review
- Query Listing Agent further on property issues, Seller situation and preferences, past offers,
   existence of other current offers and offer presentation guidelines
- Prepare Comparative Market Analysis (CMA) on property for Buyer's review
- Review the property disclosures, the property CMA, current market conditions and the prospective offer with the purchasers
- Buyer checks online Megan's Law database, and if concerned, local crime statistics with neighborhood police station

1

|    | Consultant carefully reviews offer and negotiation strategies with Buyer, including the options  |
|----|--|
|    | for offer price, due diligence contingencies and other terms                                     |
|    | Offer is written and Agent collects initial deposit check from Buyer                             |
|    | Agent schedules offer presentation with Listing Agent  |
|    | Prepare offer for presentation to Seller and/or Listing Agent: agency disclosure, offer letter,  |
|    | loan pre-approval letter, copies of Buyer-signed disclosures, etc.                               |
|    | Negotiate offer and counter-offer on Buyer's behalf and at Buyer's instruction                   |
|    | After the offer is accepted carefully review contract documents to ensure they are executed by   |
|    | all parties as required. Provide Buyer with fully executed contract copy                         |
| Du | ie Diligence, Contingency Removal & Closing the Transaction                                      |
|    | Open escrow, deliver the initial deposit check into escrow, a copy of the executed purchase      |
|    | contract is delivered to Escrow Agent, and Preliminary Title Report is ordered                   |
|    | Provide escrow information and copy of accepted contract to Loan Agent                           |
|    | Prepare timeline for the Removal of Contingencies and Close of Escrow — Copies for Buyer,        |
|    | Lender, Title officer and Listing agent  |
|    | Provide Buyer with Resource list of inspectors, contractors, other vendors and professionals.    |
|    | Coordinate appraisal appointment with Lender and Listing Agent                                   |
|    | Coordinate Buyer-specified inspections (pest, contractor, structural engineer, roof, soils,      |
|    | city/county, etc. — see CAR Buyer's Inspection Advisory) with Listing Agent                      |
|    | Monitor the timely receipt of Seller and Listing Agent provided disclosures, reports and other   |
|    | documents, as statutorily or contractually required, for Agent's review and for Buyer's review,  |
|    | approval, or request for clarification   |
|    | Preliminary Title Report is reviewed by Agent and Buyer (and Loan Agent) — if any of the         |
|    | exceptions on the Report are unclear, Agent requests full written text of the exception from     |
|    | Escrow Agent for Agent's, Buyer's and possibly Buyer's lawyer's careful review.                  |
|    | Agent attends all inspections with Buyer; Agent completes Selling Agent portion of RETDS after   |
|    | careful walk-through of the property   |
|    | Agent and Buyer carefully review inspection reports for Buyer's approval, further clarification, |
|    | objection or rejection   |
|    | Review county/city, natural and environmental hazard and other required reports Buyer            |
|    | Counsel Buyer and facilitates Buyer collection of additional information — additional            |
|    | inspections, contractor quotes, legal advice, etc. – necessary for Buyer to understand/quantify  |
|    | issues pertinent to the property's condition or circumstances                                    |
|    | Buyer's Insurance Agent contacts Escrow Officer with required policy information                 |

2/11/2011 PMC Sequence of Events: Buyer Representation (Buyer Copy) 2

|    | Buyer consults with Buyer's accountant, attorney or escrow agent to determine how they wish  |
|----|--|
|    | to hold title to the property  |
|    | Verify funding arrangements with Lender and Escrow Agent                                     |
|    | Contingencies are removed or contingency removal dates are extended as needed                |
|    | Prepare appropriate addenda or contingency removal documents                                 |
|    | Buyer increases deposit in escrow — if applicable, Agent prepares the Receipt for Increase   |
|    | Deposit under Liquidated Damages for Buyer and Seller signature                              |
|    | Deliver any addenda to Designated Broker, Escrow Agent and Loan Agent                        |
|    | Provide Buyer with information on utilities and moving                                       |
|    | Review purchase file for completeness  |
|    | Seller repairs are completed and verified  |
|    | Review Home Warranty coverage with Buyer   |
|    | Provide final instructions to Escrow Officer, and confirms Seller's FIRPTA and Cal FIRPTA    |
|    | affidavits   |
|    | Schedule appointment for Buyer to sign loan/closing documents                                |
|    | Review Estimated Closing Statement and provides to Buyer                                     |
|    | Buyer and Agent perform final walk-through of property                                       |
|    | Buyer makes arrangements for final funds to be delivered into escrow by wire or cashier's    |
|    | check in a timely manner   |
|    | Agent and Buyer meet Escrow Agent at Title Company for signing of closing documents          |
|    | Buyer makes moving arrangements, schedules change of utilities and alerts any Homeowner's    |
|    | Association of pending change of ownership   |
|    | Confirm with Escrow Agent that everything is set for scheduled close of escrow               |
|    | Buyer loan funds   |
|    | Close of Escrow  |
| Af | ter Close of Escrow  |
|    | Procures and delivers keys, alarm codes, garage genies to Buyer                              |
|    | Follow up with Buyer regularly in weeks and months after closing to check in, offer help and |

solve any problems that might have arisen.

2/11/2011 PMC Sequence of Events: Buyer Representation (Buyer Copy) 3



### BUYER: WHAT I NEED FROM YOU

- Your preferred method(s) of communication and the frequency of contact you desire.
- Contact information for all decision-makers and any professionals you wish to be part of the process (lawyer, accountant, etc.).
- The availability to review new listing information and see prospective properties in a timely manner.
- Honest feedback as to what you like and don't like in the properties we see, and as to what
  works and doesn't work regarding my way of serving your needs and our way of working
  together.
- Straightforward communication regarding any changes in your purchase parameters, timeline, plans or circumstances.
- Loan pre-approval ASAP. You need to know your full financial options, and we need pre-approval to be able to make a strong, competitive offer once the home you want to buy is found.
- The time and attention to carefully review all necessary disclosure, inspection, contract and escrow documents and reports once we locate the property you wish to purchase.
- The commitment to use me as your exclusive agent: I only work with clients who commit to
  working with me exclusively—and to those clients I devote all my time, dedication, resources
  and expertise.



### **BUYER'S EXPENSE WORKSHEET**

| \$<br>Contract Price               |  |
|------------------------------------|--|
| \$<br>1st Loan Amt% years          |  |
| \$<br>2nd Loan Amt% years          |  |
| \$<br>Total Loans                  |  |
| \$<br>Cash Down-payment            |  |
| \$<br>Closing Costs                |  |
| \$<br>Total Cash Required to Close |  |

| MONTHLY PAYMENT     |
|---------------------|
| \$ 1st Loan         |
| \$ 2nd Loan         |
| \$ Taxes            |
| \$ Insurance        |
| \$ PMI              |
| \$ Total Mo.Payment |

#### **CLOSING COSTS**

| \$<br>1st Loan fee points plus (\$)                             |
|---|
| \$<br>2nd Loan fee points plus (\$)                             |
| \$<br>Appraisal fee (\$350-450 up front with mortgage brokers)  |
| \$<br>Credit report (\$40-45)                                   |
| \$<br>Tax service (\$50-75)                                     |
| \$<br>Title insurance: CLTA policy (Fee Schedule - Sales Price) |
| \$<br>Title insurance: ALTA policy (Fee Schedule - Loan Amount) |
| \$<br>Escrow fee (fee schedule)                                 |
| \$<br>Document preparation (\$400-500)                          |
| \$<br>Notary, courier and recording (\$30 each - average)       |
| \$<br>Title drawing (\$75 average)                              |
| \$<br>Transfer taxes not paid by Seller                         |
| \$<br>Pest inspection   |
| \$<br>Home inspections  |
| \$<br>Home warranty (\$275-\$350)                               |
| \$<br>Interim interest - new loan (15 days average)             |
| \$<br>Homeowners insurance (1 <sup>st</sup> year policy)        |
| \$<br>PMI impound - if applicable (14 months)                   |
| \$<br>Tax and insurance impound - if applicable                 |
| \$<br>Pro-rated property taxes (+/-)                            |
| \$<br>Pro-rated homeowner association fees                      |
| \$<br>TOTAL Closing Costs                                       |

<sup>\*\*\*</sup>These calculations are only approximations, and vary by contract specification, region and service provider.



### **BUYING FLOWCHART**

### PREPARING TO PURCHASE YOUR HOME

#### PREPARE:

- · buyer and agent review purchase parameters
- · buyer is loan pre-approved

#### **EDUCATE:**

- · review current market
- view inventory of homes for sale and related disclosures

#### SELECT:

- · home to buy
- · review available disclosures

#### RFVIFW:

- agency disclosure; confirm buyer/agent relationship
- · buying process; market conditions
- · customary disclosures and reports
- · contract and decisions when making offer
- · inspections and selection of inspectors

#### OFFER:

- · write offer
- · prepare buyer's expense worksheet
- · obtain preliminary insurance eligibility
- · schedule tentative inspections
- · discuss possible responses from seller

### THE PURCHASE PROCESS

#### **GET INTO CONTRACT:**

presentation, negotiation and acceptance of purchase contract

#### **CONTINGENCY REMOVAL:**

- approve all documents, disclosures and reports, preliminary title report, loan commitment, insurance, etc
- · request for repairs/credit to seller
- · negotiate request for repairs/credit
- · final loan approval
- · remove all contingencies
- · increase of deposit to escrow

#### PREPARING FOR CLOSE OF ESCROW:

- · final walk-through inspection
- · sign closing and loan documents
- deposit balance of down payment and closing costs to escrow
- · loan funding
- · title recordation

#### **OPEN ESCROW:**

- · initial deposit sent to escrow
- · contract sent to lender
- · appraisal scheduled

#### FINANCING & INSPECTION CONTINGENCY PERIOD:

- · appraisal occurs
- · home inspection done with buyer present
- determine whether any additional inspections are warranted
- · perform additional inspections
- receive seller's disclosures not in original disclosure package
- · review inspection reports and all disclosures
- · obtain homeowner's insurance

#### **CLOSE OF ESCROW:**

- · obtain keys
- · post-closing follow up
- · buyer evaluation of agent services



Moving Checklist
(To help you avoid any last minute problems)

### **BEFORE THE MOVE:**

| Stop services on                  | Arrange for services at new house   |
|-----------------------------------|-------------------------------------|
| Telephone                         | Telephone                           |
| Cable television                  | Water                               |
| Water                             | Electricity & gas                   |
| Electricity & gas                 | Appliances hook-up                  |
| Laundry service                   | Cable television                    |
| Newspaper                         | Garbage collection                  |
| Lawn care                         | Internet access                     |
| Garbage collection                | Alarm                               |
| File a change of address with     | Schools/Daycare                     |
| Post office                       | Notify prior daycare/schools        |
| Credit card companies             | Get transcript of children's grades |
| Insurance companies               | Locate new daycare/school           |
| Banks/credit unions               |                                     |
| Employer                          | AFTER THE MOVE:                     |
| Magazine/newspaper                |                                     |
| subscriptions                     | Set up services for                 |
| Clubs, social groups              | Newspaper                           |
| Friends/relatives                 | Laundry service                     |
|                                   | Lawn care                           |
| Things to do                      |                                     |
| Confirm with moving company       | Get new licenses for                |
| Arrange for room painting and     | Driving                             |
| carpet cleaning prior to move-in  | Pets                                |
| Arrange for serviceman to get     |                                     |
| appliances ready for move         | Miscellaneous                       |
| Make arrangements for care of     | Register to vote                    |
| children and pets on moving day   | Locate new doctor and dentist       |
| Assemble a moving kit to take to  | Open new bank accounts              |
| new house (hammer, nails, pliers, | Have locksmith change locks         |
| masking tape, tape measure,       |                                     |
| flashlight, fuses, rags, scissors |                                     |
| and first aid kit)                |                                     |
| Return library books              |                                     |
| Return borrowed items             |                                     |
| Round up things borrowed          |                                     |
| Defrost and dry refrigerators and |                                     |
| freezers to be moved              |                                     |
| Obtain medical, dental and vet    |                                     |
| records; transfer prescriptions   |                                     |



# **TITLE VESTING**

## **COMMON WAYS TO TAKE TITLE OF REAL PROPERTY**

| Vesting Subject       | TENANCY IN COMMON   | JOINT TENANCY   | COMMUNITY<br>PROPERTY  | COMMUNITY<br>PROPERTY<br>Right of Survivorship  |
|-----------------------|---|---|--|---|
| PARTIES               | Any number of persons (can be married couple).  | Any number of persons (can be married couple).  | Only married couple.   | Only married couple.  |
| DIVISION              | Ownership can be divided into any number of interests, equal or unequal.  | Ownership interest must be equal.   | Ownership and managerial interests are equal (except control of business is solely with managing spouse).                              | Ownership and managerial interests are equal.   |
| TITLE                 | Each co-owner has a separate legal title to his/ her undivided interest.  | One title only to the whole property.   | Title is in the "community."<br>Each interest is separate<br>but management is unified   | Title is in the "community," management is unified.   |
| POSSESSION            | Equal right of possession.  | Equal right of possession.  | Equal right of possession.   | Both co-owners have equal management and control.   |
| CONVEYANCE            | Each co-owner's interest<br>may be conveyed<br>separately by its owner.   | Conveyance by one co-<br>owner without the others<br>breaks the joint tenancy.  | Both co-owners must join on conveyance of real property. Separate interest cannot be conveyed.   | Right of survivorship may<br>be terminated pursuant to<br>the same procedures by<br>which a joint tenancy may<br>be served.   |
| PURCHASER'S<br>STATUS | Purchaser becomes a tenant in common with the other co-owners in the property.                                      | Purchaser becomes a<br>tenant in common with<br>the other co-owners in the<br>property.   | Purchaser can only acquire whole title of community, cannot acquire part of it.  | Purchaser can only acquire whole title of community, cannot acquire a part of it.   |
| DEATH                 | On co-owner's death,<br>interest passes by will to<br>his/her devisees or heirs.<br>No right of survivorship.       | On co-owner's death, his/her interest ends and cannot be disposed of by will. Survivor owns the property by right of survivorship.  | On co-owner's death, ½<br>belongs to survivor in<br>severalty. ½ goes by will to<br>descendant's devisees or<br>by success to survivor | Upon the death of a spouse, his/<br>her interest passes to the surviving<br>spouse, without administration,<br>subject to the same procedures as<br>property held in joint tenancy. |
| CREDITOR'S<br>RIGHTS  | Co-owner's interest may be sold on execution sale to satisfy his/her creditor. Creditor becomes a tenant in common. | Co-owner's interest may be sold on execution sale to satisfy creditors. Joint tenancy is broken, creditor becomes tenant in common. | Co-owner's interest cannot be seized and sold separately. The whole property may be sold on execution sale to satisfy creditor.        | Property of community is liable<br>for debts of either which are<br>made before or after marriage;<br>whole property may be sold on<br>execution sale to satisfy creditor.          |

NOTE: This table is intended for reference only. Clients should be advised to seek professional counsel from an attorney and/or CPA to determine the legal and tax consequences of how title is vested.



## **UNDERSTANDING ESCROW**

### WHAT IS ESCROW?

Escrow is the process by which the interests of all parties in a real estate transaction are protected, ensuring that all conditions of the sale have been met before property and money change hands.

Escrow is an independent depository wherein all funds, instructions, and documents for the purchase of your home are held, including down payment, Lender's funds, documents for the new loan, hazard and title insurance, title report and the grant deed from the seller. At the close of escrow, the "Escrow Holder" delivers these items to the appropriate parties, disburses the funds, and handles the associated paperwork.

### **OPENING THE ESCROW**

The Buyer's Real Estate Agent will open the escrow and request the initial deposit be wired or delivered to the escrow office and placed into an escrow account as soon as the buyer executes the sales agreement. At the opening of escrow, the buyer may be asked to provide identification information such as birth date and social security number. This information remains confidential.

### WHAT DOES AN ESCROW HOLDER DO?

The Escrow Holder is a neutral third party that maintains the escrow account and impartially oversees the escrow process making sure all conditions of the sale are properly met.

The Escrow Holder's duties include:

- · serving as the neutral third agent and the liaison between all parties involved.
- · requesting a preliminary title search to determine the status of title of the property.
- · requesting a beneficiary statement of debt or obligations to be taken over by the buyer.
- · requesting a payoff demand from beneficiaries when the seller is paying off debts.
- · complying with the lender's requirements as specified in their instructions to escrow.
- · preparing or securing the deed and other documents related to escrow.
- · prorating taxes, interest, insurance, and rents.
- · preparing escrow instructions.
- · receiving purchase funds from the buyer.
- · receiving loan funds from the buyer's lender.
- · closing the escrow pursuant to instructions supplied by the seller, buyer and lender.
- · recording the deed and any other documents.
- · disbursing funds as authorized by the instruction including charges for title insurance, recording fees, real estate commissions and loan payoffs.
- preparing final statements for all parties involved that account for the disposition of all funds held in the escrow account.



| FOR OFFICE USE |
|----------------|
| Date           |
| DB Entry       |
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# HOME BUYER QUESTIONAIRE

Thank you for trusting us with your Real Estate needs.

Please take a moment to complete these questions, as they will help us to help you.

| BASIC INFO  |
|---|
| Name 1:   |
| Name 2:   |
| Mailing Address:  |
| City, State, Zip:   |
| Home Phone:   |
| Cell Phone 1:[ ] I accept text messages   |
| Cell Phone 2:[ ] I accept text messages   |
| Other:  |
| Email 1:  |
| Email 2:  |
| Preferred method of contact: [ ] Email [ ] Phone [ ] Text Message                           |
| Are you a first time home buyer? [ ] Yes [ ] No   |
| Are you purchasing an investment property? [ ] [ ] No Do you have an LLC? [ ] yes [ ] No    |
| Why are you moving?   |
| When would you like to be in your home?   |
| How have you been looking for homes? (Realtor, Internet search, going to open houses, etc.) |
| Where do you work?  |
| Is the commute an important issue for you? [ ] Yes [ ] No                                   |
| Do you have children? [ ] Yes [ ] No. What are their names and ages?                        |

| Do you plan to put them in public schools?   |
|--|
| Do you have any pets?  |
|  |
| At what stage are you in the home purchase process:  |
| a) Just looking; not-pre-approved  |
| <ul><li>b) Just looking; working with a lender</li><li>c) Waiting for my current home to close</li></ul> |
| d) Looked at a couple of homes, ready to make an offer   |
|  |
| <u>FINANCIALS</u>  |
| What price range are you considering?  |
| Can you buy a home without selling your present home first? [ ] Yes [ ] No [ ] N/A                       |
| What do you think your home will sell for?   |
| Do you know what the costs are that are associated with selling and purchasing a home?                   |
|  |
|  |
| How much do you think your down-payment will be?   |
| Are you pre-approved? [ ] Yes [ ] No All Cash? [ ] Yes [ ] No FHA? [ ] Yes [ ] No                        |
| Who is your lender?  |
| Are you currently renting or do you own your home?   |
| Need to sell a home to purchase a home? [ ] Yes [ ] No   |
| Do you have homeowners or renters insurance? [ ] Yes [ ] No  |
| If yes, who is your agent?   |
| De very language and another time very many house uning a taust? [ ] Very [ ] 1 No.                      |
| Do you know about protecting your new home using a trust? [ ] Yes [ ] No                                 |
| If yes, and you already have a trust, when is the last time it was reviewed by an attorney?              |
| If no, how do you plan to protect your new home if something happens to you?                             |
| How do you plan to hold title to your new home?  |
| How do you plan to hold title to your new home?  |
| Would you like to have a free consultation with an attorney to discuss the different ways to hold title? |
| [ ] Yes [ ] No   |

Have you spoken to your tax professional about how a purchase will affect your income taxes? [ ] Yes [ ] No

Do you know about mortgage protection (life insurance) options? [ ] Yes [ ] No

### **NEIGHBORHOODS**

| What neighborhoods are you considering?  |
|--|
| What is most important to you in a neighborhood?   |
| What is more important, the neighborhood or the features and amenities of the house?   |
| HOME PARAMETERS  |
| Have you made a list of all the things that you would like in a new home, sorted by priority?  [ ] Yes [ ] No  What are the three or four most important features? |
| What are the two or three most important rooms in the house to you?  |
| Are there any things that you particularly can't stand in a house or a location?   |
| What do you like best and least in your current home?  |
| What architectural style or an era of construction appeals to you most?  |
| What are your non-negotiable, minimum requirements in a new home?  |

### **HOME CRITERIA**

| Minimum # or bedrooms and baths           | Preferred # of bedrooms and baths                          |
|---|--|
| Square footage                            |  |
| Garage                                    |  |
| Parking                                   |  |
| Lot size                                  | Flat lot   |
| Yard/deck                                 |  |
| Office                                    | Formal dining room   |
| Other rooms?                              |  |
| How important is:                         |  |
| View Quiet stre                           | eet Privacy  |
| Being within walking distance of local co | mmercial district?   |
| Hardwood floorsFireplace                  | e Remodeled kitchen  |
| Remodeled baths                           |  |
| Other amenities                           |  |
| Would you consider buying a condomini     | um?  |
| Are you interested or willing to remodel  | or renovate? [ ] Yes [ ] No How much?                      |
| If you had to compromise or trade off or  | any of your wants, what would you be willing to compromise |
| on or trade off?                          |  |
| Would you look at properties outside yo   | ur parameters that I think are particularly good?          |
| Have you seen any homes that you liked    | ?  |
| What did you like about them?             |  |

Are there any other wants or needs that we haven't discussed?

### REAL ESTATE AGENT RELATIONSHIPS, EXPECTATIONS AND THE PROCESS

| Have you ever worked with a real estate agent before? [ ] Yes [ ] No                                   |
|--|
| How was that experience?   |
| What are you looking for in an agent?  |
| Do you understand the relationship between a real estate agent and you? [ ] Yes [ ] No                 |
| Do you know how I get paid?  |
| How would you like to be notified when properties that fit your parameters come on the market?         |
| Would you like me to show you properties or would you prefer to go to Open Houses?                     |
| How would you like me to communicate with you?   |
| Are you familiar with the most recent Real Estate Purchase Contract?                                   |
| Are you familiar with the reports and disclosures associated with a real estate purchase in this area? |



| FOR OFFICE USE |
|----------------|
| Date           |
| DB Entry       |
| File           |
| TY             |

# SUPPLEMENTAL QUESTIONAIRE

Thank you for trusting us with your Real Estate needs.

Please take a moment to complete these questions, as they will help us to help you.

| BASIC INFO  |         |
|---|---------|
| Name 1:   | Name 2: |
| When is your birthdate? No. 1:                    | No 2:   |
| When is your anniversary?                         |         |
| What are your kids names & ages?                  |         |
| What kind of pets do you have?                    |         |
| What are your pets' names?                        |         |
| Name 1 - What is your profession?                 |         |
| Name 2 - What is your profession?                 |         |
| What is your favorite beverage? No 1:             | No. 2:  |
| Where do you vacation?                            |         |
| How do you spend your spare time?                 |         |
| Do you have any collections? If so, of what?      |         |
|   |         |
| What is your dream vacation?                      |         |
|   |         |
| What is at the top of your Bucket List right now? |         |
|   |         |



# Helpful Links:

School Information & School Ratings <u>www.greatschools.org</u>

Sonoma County Visitors & Info Guide Sonoma County Airport www.sonomacountyairport.org Sonoma County Parks www.parks.sonomacounty.ca.gov www.sonomacounty.com

Santa Rosa Visitors & Info Guide
Santa Rosa Chamber of Commerce
www.santarosametrochamber.com
Sebastopol Chamber of Commerce
Cotati Chamber of Commerce
Petaluma Chamber of Commerce
Rohnert Park Chamber of Commerce
www.rohnertparkchamber.org
Windsor Chamber of Commerce & Vistors Center
Healdsburg Chamber of Commerce & Visitors Bureau

www.sebastopol.org www.cotati.org www.petalumachamber.com

www.visitsantarosa.com

www.windsorchamber.com www.healdsburg.com

 ${\color{red} \textbf{County of Sonoma PRMD} \ \underline{www.sonomacounty.ca.gov/Permit-and-Resource-} } \\ \underline{\textbf{Management}}$