



Mary's Ultimate "Buying a House" Checklist

Instructions:

1. Answer the questions with your significant other. (Not buying together? Skip to #3.)
2. Discuss, deliberate, have a brief existential crisis, question your place in the world and everything, then calmly come to an agreement. No seriously: You're going to disagree about some things. This worksheet is a chance to talk those differences out.
3. Bring your checklist when we meet or email it to me at MLWilliams11@gmail.com

Remember: There are no right answers. Only **your** answers.

Section #1 | Hopes and Dreams

Objective: Acknowledge your underlying reasons for wanting to buy a Second or Primary home in the Desert.

Why are you buying a home in the Desert?

Check all that apply. If there's one reason you feel speaks especially to you, circle it with some hearts. Y'know. If you want.

- I want a Second Home in the Desert
- I want to live in an Active Community
- I want to entertain friends and family
- I would like to live on a Golf Course
- I want to live in a 55+ Community
- Tennis courts are important
- I want Mountain Views
- I want to spend my winters in the Desert
- Other: _____

Any other reasons?

In your own words, what's the most important thing to you about owning a home in the Desert?

The feeling of accomplishment? Desert Experience? Entertaining? The garages? Golfing or playing tennis everyday?

How would you describe the right neighborhood for you right now?

Golfing? Tennis? Equestrian? Active? Over 55+?



760.567.7282
www.MaryLWilliamsandAssociates.com

DRE#01277445

MLWilliams11@gmail.com



Section #2 | Your Support Network

Objective: Set your expectations for your friends, family, and any expert partners (agents, lawyers, etc.) you may work with along the way.

Name specific friends, family, and expert partners who will fill these roles.

Co-Buyer Will anybody be buying or co-signing with you? Your significant other? Your parents?	Adviser Who will be guiding you along the way?	Co-Shopper Who will be helping you pick the right place?	Emotional/Texting Support Who will always be there when you need them?

Section #3 | The Property

Objective: Get a handle on your knowledge and assumptions about what you want in a home.

Circle which of these most closely resembles the house you're looking for?

Mid-Century Modern Homes

New Homes

Condos with Garages

Mid-Century Modern Condos

Homes with Pools

Income Properties

Spanish Style Homes

Palm Springs Condos

Luxury Homes

Luxury Condos

Single-Family Homes

Single-Level Condos

Describe the ideal house you want to buy.

Someplace with a three-car garage? Pool? Large Patio for Entertaining? Attached Casita? Office Space?

Which Desert Communities are you interested in?

Rank in order of preference.

1 _____
2 _____
3 _____
4 _____
5 _____
6 _____

Do you have any must-haves?

Rank in order of preference.

1 _____
2 _____
3 _____
4 _____
5 _____
6 _____

Which of the following features do you want?

Number of Bedrooms: 1 2 3 4 _____

Number of Bathrooms: 1 2 3 4 _____

Approximate Square Footage: _____

Indicate your preference for each feature below.

	Want	Need	Not important
Fireplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dedicated parking or garage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walkout Patio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Central air	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Privacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Porch/sunroom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pool	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Golf Cart Garage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Landscaping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tile Floors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open concept	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stone countertops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Light-filled rooms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Panoramic Views	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walkable neighborhood	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gym or Workout area Close by	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
On Golf Course	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mountain Views	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Most important room or specialty room?

Rec room? Formal dining room? Work out room?

Anything else?

Section #4 | Finances

Will you be financing or cash?

Do you need names of Lenders in the Desert?

If you're financing your Second home, have you been pre-approved for a mortgage yet?

Pre-approval shows your agent and the home sellers that you're serious!

Yes, I have been pre-approved. No, I haven't been pre-approved. I need some help understanding pre-approval.

Who is your lender and their contact information: _____

Section #5 | Your Outlook

Objective: Help me know how you're feeling, what you're confident about, and where you could use a little bit of help.

Which parts of the buying process are you particularly excited or nervous about?

Only the unbalanced are excited about the mortgage process. Just sayin'.

	Nervous	Neutral	Excited
Research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working with an agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shopping online for homes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Getting a loan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open houses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Making an offer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Moving in	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

And we're done!

Now that you have a handle on what you're looking for and what you expect, it's time to give me a call and I will help you get the terrific home you want.



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