

Use this worksheet to get clarity on your priorities before we tour homes. I'm here to help if you get stuck.

Quick Snapshot

Target area(s) / neighborhoods:

Ideal move-in timeline:

Budget comfort zone (range you feel good touring):

1) Deal Breakers (Hard No)

Limit this to 2–4. If any deal breaker isn't met, it's a no.

Deal breaker #1:

Deal breaker #2:

Deal breaker #3:

Deal breaker #4:

2) Needs (Non-Negotiables)

Requirements for daily life (beds/baths, commute, layout, parking, etc.).

Need #1:

Need #2:

Need #3:

Need #4:

Need #5:

Need #6:

3) Wants (Nice-to-Haves)

These would be amazing to hit—aim for a few, not all. No house is perfect, but we'll do our best to come close!

Want #1:

Want #2:

Want #3:

Want #4:

Want #5:

Want #6:

Want #7:

Want #8:

Want #9:

Want #10:

Tour Notes (use one box per home)

Property Address / MLS ID:

Deal breakers met? Yes No Needs met? Yes No Wants score (0-20): _____

Top 3 Pros:

Top 3 Cons:

Property Address / MLS ID:

Deal breakers met? Yes No Needs met? Yes No Wants score (0-20): _____

Top 3 Pros:

Top 3 Cons:

Property Address / MLS ID:

Deal breakers met? Yes No Needs met? Yes No Wants score (0-20): _____

Top 3 Pros:

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