

Client Referral Information Form

Just wanted to drop you a quick note to say thank you for your referral. WhiteWater Realty will be more than happy to pay a 25% referral fee. If you are referring a seller, it will be 25% of the listing fee. If you are referring a Buyer, it will be 25% of the selling side. I will make out a formal referral form when I have a bit more data to fill in:

This is a typical questionnaire that I have an agent referring a client fill in. First of all the agent and client info needs to be correct...sometimes phone connections make it difficult to hear.

And if you do not have answers to all of the questions below...that is fine too. Any information is helpful for my first communication with your client.

My goal is to sell them a property, so they more comfortable they feel in the beginning is important. Please fill in the data below.

Referring Firm Information:

Firm: Name

Firm License :#:

Agent Name:

Agent License #

Firm Address:

Off Phone:

Office Fax:

Agent Cell Phone:

Agent Home Phone:

Agent Email Address:

Fed. Tax ID# (EIN or SS#, if sole proprietor):

Is the client aware of this referral? yes or no

Client's Name:

Client's Address:

Client's Cell Ph:

Client's Cell Ph: #2

Client's Home Ph:

Client's Email:

Client's Email #2:

Will this be a vacation home, relocation, or retirement home?

Land Purchase?

If relocation or retirement does your client need to sell their home first?

Do you know what your client is looking for? Home condo b/b Acreage

Price range?

Any additional requirements or special needs?

How soon does he want to purchase? ASAP, 3 months. 6 month. 1 yr. 2-3 years

Do you know which city interests them most? If not, that is okay.

Highlands, Cashiers, Sapphire, Lake Toxaway, Lake Glenville, Other?

Any additional information about the buyer that would be helpful for me to know....

Ex. family or friends in the area, needs a job/if so what kind/ student/has pets/

Interests: Golf, tennis, hiking, shopping, biking,

Has your client seen a specific MLS number that interests him?

Has your client been to the area before?

Is your client coming this way soon?

Looks like a lot, but the more I know before hand, the smoother it makes for your client. And my goal is to sell your client something. I will keep you updated periodically as to what is happening. Please feel free to inquire at any time as well as communicate any additional information. Thanks again for letting me work with this client and any additional ones that may want to come my way.

Warm regards,

Dorothy

Dorothy Swearingen, Realtor/Owner/Broker

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