**[Company name]**

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

# Estate agency client intake form

New client - whether buying, selling, letting or renting, get it right first time.

## Client details

**Full name:** _____

**Phone:** _____

**Email:** _____

**Client type:** _____

**Requirements:** _____

**Budget:** _____

**Timescale:** _____

**Mortgage / funding status:** _____

**ID verified:** _____

## Sign-off

**Agent:** _____ **Client:** _____ **Date:** _____