[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:** _____