

ELITE TEAM

SILVER GLEN COOPERATIVE • REAL ESTATE LEAD INTAKE FORM

Property Manager: 425-957-1032 | Elite Team: 425-428-1678

This section completed by the Marketing Tour Coordinator

LEAD INFORMATION

Intake By:

Date:

Client's Name:

Phone:

Email:

Referred By: *(resident, agent, ad, event, website, etc.)*

Preferred Contact Method: *(call / text / email)*

Realtor's Name:

Phone:

Email:

SCREENING QUESTIONS — CANDIDATE MUST MEET THE FOLLOWING CRITERIA

- ☐ Over 55+ Facility ☐ Independent Living ☐ 9-Month Residency at SG
☐ Non-Smoking ☐ Pet Policy (30 lbs. max)

Type of Pet:

- ☐ Understands Importance of Participation

How did you hear about Silver Glen?

What type of units would you like to tour? *(1, 2, and/or 3 bedrooms)*

BUYER PROFILE & TIMING

Ideal Timing to Move / Purchase: *(ASAP, 30/60/90 days, 6+ months)*

Budget / Price Range:

Financing or Cash? *(Financing / Cash)*

If Financing — Lender / Pre-Approval Status:

Selling Current Home? (Contingent Sale) *(Yes / No)*

If Yes — Current Home Address / Status: *(listed, under contract, not yet listed)*

Motivation for Moving: *(downsizing, proximity to family, etc.)*

Number of Occupants:

Mobility / Accessibility Needs: *(if any)*

TOUR SCHEDULING

Tours are on Thursdays at 4:00 PM with the Elite Team. Will this time work for you?

☐ Yes ☐ No — a member of the Elite Team will call to schedule

When would you like to tour?

When do you plan on moving?

THIS SECTION COMPLETED BY THE TOUR GUIDE

Name of Tour Guide:

Date of Tour:

What units were toured?

What size unit seems to fit his/her needs?

Was there a unit that they wished to purchase / especially interested?

☐ Yes ☐ No

Which unit(s)? *Reminder: if planning to purchase, give client Welcome Packet*

Next Steps:

Additional Notes:

Does client wish to be added to the Notification list? ☐ Yes ☐ No

After completion, log the tour in the 3-ring marketing book in the outer business office and give this form to the Property Manager for review and filing.