

Relocation Questionnaire

Tell me about you and your family

Person completing this form

Transferee's First Name _____ Last _____
Preferred Name _____ Date of Birth _____
Interests, hobbies, participates in, member of _____

The relocation presents these special considerations _____

Spouse First Name _____ Last _____
Preferred Name _____ Date of Birth _____
Interests, hobbies, participates in, member _____

The relocation presents these special considerations _____

Oldest Child _____ Date of Birth _____ School Grade _____
Preferred Name _____
Interests, hobbies, participates in, member of _____

Lives at home full time, part time, seasonally _____
Any special considerations _____

Next Oldest Child _____ Date of Birth _____ School Grade _____
Preferred Name _____
Interests, hobbies, participates in, member of _____

Lives at home full time, part time, seasonally _____
Any special considerations _____

Your Family

Next Oldest Child _____ Date of Birth _____ School Grade _____
Preferred Name _____
Interests, hobbies, participates in, member of _____

Lives at home full time, part time, seasonally _____
Any special considerations _____

Next Oldest Child _____ Date of Birth _____ School Grade _____
Preferred Name _____
Interests, hobbies, participates in, member of _____

Lives at home full time, part time, seasonally _____
Any special considerations _____

Next Oldest Child _____ Date of Birth _____ School Grade _____
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Interests, hobbies, participates in, member of _____

Lives at home full time, part time, seasonally _____
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Next Oldest Child _____ Date of Birth _____ School Grade _____
Preferred Name _____
Interests, hobbies, participates in, member of _____

Lives at home full time, part time, seasonally _____
Any special considerations _____

Extended Family members who will be relocating with you

First Name _____ Last Name _____ Date of Birth _____
Preferred Name _____ Relationship to Transferee _____
Interests, hobbies, participates in, member of _____

Lives at home full time, part time, seasonally _____
Any special considerations _____

First Name _____ Last Name _____ Date of Birth _____
Preferred Name _____ Relationship to Transferee _____
Interests, hobbies, participates in, member of _____

Lives at home full time, part time, seasonally _____
Any special considerations _____

First Name _____ Last Name _____ Date of Birth _____
Preferred Name _____ Relationship to Transferee _____
Interests, hobbies, participates in, member of _____

Lives at home full time, part time, seasonally _____
Any special considerations _____

Tell me about your family, schooling requirements, joint family activities, extended family, is there anyone with special needs, special medical requirements? What is your family passionate about?

Why are you relocating? (Job, Retirement, Other) _____

Tell me about your current home

Current Address _____
City _____ State _____ Postal _____

How long have you lived in your current home? _____

Tell me at least three things you love about your current home.

1. _____
 2. _____
 3. _____
- Other _____

Current Home Data

Style or Styles _____ Square Feet _____

Urban or Rural Setting _____

Number of Bedrooms _____ Number of Bathrooms _____

Formal Dining Room/Dinette or both? _____

Amenities (fireplace, Built-ins) _____

Special Storage needs _____

Desired yard size _____

Desirable Near By Conveniences _____

Current Commute Time _____

Maximum Desirable Commute Time _____

Describe the area you currently live in. _____

Please email digital pictures of your homes front and rear elevation along with any special features such as gardens, play areas, or special storage requirements. Send pictures of the interior for each major room in your home, e-mail pictures of important community amenities mikedolan@realtyexecutives.com

Tell me about your dream home.

What don't you want in your new home? _____

What do you want in your new home? _____

Preferred Style or Styles _____

Urban or Rural Setting _____

Number of Bedrooms _____ Number of Bathrooms _____

Formal Dining Room/Dinette or both? _____

Amenities _____

Special Storage needs _____

Desired yard size _____

Desirable Near By Conveniences _____

Price range _____ to _____

Space needs for frequent visitors _____

Must haves _____

Like to haves: _____

Answer these general questions please

Is this your first relocation? _____

How have past relocations gone? _____

What would you do the same or differently this time? _____

How much do you know about the Metro Milwaukee and surrounding area? _____

What kind of information about Milwaukee and surrounding area would you like to receive? _____

Schools _____ Post High School Education _____

Other _____

Job Opportunities, field _____

Entertainment Arts Outdoor activities types _____

Professional Sports Amateur Sports types _____

Ethnic Events Types _____

- Volunteer Opportunities Types _____
- Social Recreational Clubs Types _____
- Interests or hobbies Types _____
- Other _____

- Contact Information
- Phone _____
 - Cell _____
 - Spouse Cell _____
 - Office _____
 - Spouse Office _____
 - Fax _____
 - Home email _____
 - Office email _____
 - Spouse email _____

Check preferred options
 Do we have your permission to contact you at the above listed numbers and addresses? _____

How much of a down payment do you have? _____
 Source of Funds? _____

Might you qualify for any special financing programs? (VA, FHA,) _____

What would you expect of me and my firm? _____

What is your communication style? _____

What style do you like to receive information in? _____

Is there anything I can do for you during this relocation process that you would find extraordinarily valuable? _____

Mike Dolan, Associate Broker



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