



# **“On The Money Report”**

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## ***Three Important Worksheets to Use***

### **Before**

## ***You Buy or Sell Your Next Home***

*Steve*

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“The Investor’s Advocate”

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You'll want to make several copies of this checklist and fill one out for each home you tour. Then, comparing your ratings later will be easy.

| THE HOME                             | Good  | Average | Poor  |
|--------------------------------------|-------|---------|-------|
| Square footage _____                 | _____ | _____   | _____ |
| Number of bedrooms _____             | _____ | _____   | _____ |
| Number of baths _____                | _____ | _____   | _____ |
| Practicality of floorplan _____      | _____ | _____   | _____ |
| Interior walls condition _____       | _____ | _____   | _____ |
| Closet/storage space _____           | _____ | _____   | _____ |
| Basement _____                       | _____ | _____   | _____ |
| Fireplace _____                      | _____ | _____   | _____ |
| Cable TV _____                       | _____ | _____   | _____ |
| Basement: dampness or odors _____    | _____ | _____   | _____ |
| Exterior appearance, condition _____ | _____ | _____   | _____ |
| Lawn/yard space _____                | _____ | _____   | _____ |
| Fence _____                          | _____ | _____   | _____ |
| Patio or deck _____                  | _____ | _____   | _____ |
| Garage _____                         | _____ | _____   | _____ |
| Energy efficiency _____              | _____ | _____   | _____ |
| Screens, storm windows _____         | _____ | _____   | _____ |
| Roof: age and condition _____        | _____ | _____   | _____ |
| Gutters and downspouts _____         | _____ | _____   | _____ |

| THE NEIGHBORHOOD                                      | Good  | Average | Poor  |
|---|-------|---------|-------|
| Appearance/condition of nearby homes/businesses _____ | _____ | _____   | _____ |
| Traffic _____   | _____ | _____   | _____ |
| Noise Level _____                                     | _____ | _____   | _____ |
| Safety/Security _____                                 | _____ | _____   | _____ |
| Age mix of inhabitants _____                          | _____ | _____   | _____ |
| Number of children _____                              | _____ | _____   | _____ |
| Pet restrictions _____                                | _____ | _____   | _____ |

| THE NEIGHBORHOOD (Cont.)                  | Good  | Average | Poor  |
|---|-------|---------|-------|
| Parking _____                             | _____ | _____   | _____ |
| Zoning regulations _____                  | _____ | _____   | _____ |
| Neighborhood restrictions/covenants _____ | _____ | _____   | _____ |
| Fire protection _____                     | _____ | _____   | _____ |
| Police _____                              | _____ | _____   | _____ |
| Snow removal _____                        | _____ | _____   | _____ |
| Garbage service _____                     | _____ | _____   | _____ |

| SCHOOLS                       | Good  | Average | Poor  |
|-------------------------------|-------|---------|-------|
| Age/condition _____           | _____ | _____   | _____ |
| Reputation _____              | _____ | _____   | _____ |
| Quality of teachers _____     | _____ | _____   | _____ |
| Achievement test scores _____ | _____ | _____   | _____ |
| Play areas _____              | _____ | _____   | _____ |
| Curriculum _____              | _____ | _____   | _____ |
| Class size _____              | _____ | _____   | _____ |
| Busing distance _____         | _____ | _____   | _____ |

| CONVENIENCE TO:                 | Good  | Average | Poor  |
|---------------------------------|-------|---------|-------|
| Supermarket _____               | _____ | _____   | _____ |
| Schools _____                   | _____ | _____   | _____ |
| Work _____                      | _____ | _____   | _____ |
| Shopping _____                  | _____ | _____   | _____ |
| Child care _____                | _____ | _____   | _____ |
| Hospitals _____                 | _____ | _____   | _____ |
| Doctor/dentist _____            | _____ | _____   | _____ |
| Recreation/parks _____          | _____ | _____   | _____ |
| Restaurants/entertainment _____ | _____ | _____   | _____ |
| Church/synagogue _____          | _____ | _____   | _____ |
| Airport _____                   | _____ | _____   | _____ |
| Highways _____                  | _____ | _____   | _____ |
| Public transportation _____     | _____ | _____   | _____ |

*Note: use the comments column for edits to ranking. For example: a garage may be very important but it may be okay if it is detached. A carport may not be acceptable.*

|  | Very Important | Would Like | Not Important | Do Not Want | Comments |
|--|----------------|------------|---------------|-------------|----------|
| Newer home   |                |            |               |             |          |
| Home type:<br>•Detached<br>•Town home<br>•Condo                          |                |            |               |             |          |
| Home style<br>•Ranch (no stairs)<br>•Colonial<br>•Contemporary<br>•Other |                |            |               |             |          |
| No. of bedrooms  |                |            |               |             |          |
| No. of bathrooms   |                |            |               |             |          |
| Master Bath  |                |            |               |             |          |
| Family Room<br>(in addition to Living Room)                              |                |            |               |             |          |
| Updated kitchen<br>(built-in microwave, disposal, etc.)                  |                |            |               |             |          |
| Dining Room  |                |            |               |             |          |
| Den/Study  |                |            |               |             |          |
| Laundry Room   |                |            |               |             |          |
| Finished basement  |                |            |               |             |          |
| Attic  |                |            |               |             |          |
| Central Air Conditioning   |                |            |               |             |          |
| Updated plumbing   |                |            |               |             |          |
| Updated wiring   |                |            |               |             |          |
| Move-in condition  |                |            |               |             |          |
| Fireplace  |                |            |               |             |          |
| Skylights  |                |            |               |             |          |
| Gas Range  |                |            |               |             |          |
| Hard Wood Floors   |                |            |               |             |          |
| Garage   |                |            |               |             |          |
| Wooded Lot/Privacy   |                |            |               |             |          |
| Big Yard   |                |            |               |             |          |
| Fenced property  |                |            |               |             |          |
| Deck/Patio   |                |            |               |             |          |
| Screened Porch   |                |            |               |             |          |
| Pool   |                |            |               |             |          |
| Landscaping  |                |            |               |             |          |

**Additional Comments** (Use back if necessary):

## The Basics

1. What part of town (or country) do you want to live in? \_\_\_\_\_
2. What price range would you consider? No less than \_\_\_\_\_ but no more than \_\_\_\_\_
3. Are schools a factor and, if so, what do you need to take into consideration (e.g., want specific school system, want kids to be able to walk to school, etc.)?  
\_\_\_\_\_
4. Do you want an older home or a newer home (less than 5 years old)? \_\_\_\_\_
5. What kind of houses would you be willing to see?  
\_\_\_\_\_ One story \_\_\_\_\_ 2 story \_\_\_\_\_ split foyer \_\_\_\_\_ bi-level \_\_\_\_\_ tri-level  
\_\_\_\_\_ townhouse or condo \_\_\_\_\_ mobile home
6. What style house appeals to you most?  
\_\_\_\_\_ contemporary \_\_\_\_\_ traditional \_\_\_\_\_ southwestern \_\_\_\_\_ colonial \_\_\_\_\_ no preference
7. How much renovation would you be willing to do? A lot \_\_\_\_\_ A little \_\_\_\_\_ None! \_\_\_\_\_
8. Do you have to be close to public transportation? \_\_\_\_\_ yes \_\_\_\_\_ no
9. Do you have any physical needs that must be met, such as wheelchair access? \_\_\_\_\_ yes  
\_\_\_\_\_ no
10. Do you have any animals that will require special facilities? \_\_\_\_\_ yes \_\_\_\_\_ no  
If so, what? \_\_\_\_\_

### 11. The Lot

|                                    | Must Have | Would Like to Have |
|------------------------------------|-----------|--------------------|
| Large yard (1 acre or more)        | _____     | _____              |
| Small yard (less than 1 acre)      | _____     | _____              |
| Fenced yard                        | _____     | _____              |
| Garage                             | _____     | _____              |
| Carport                            | _____     | _____              |
| Patio/deck                         | _____     | _____              |
| Pool                               | _____     | _____              |
| Outdoor spa                        | _____     | _____              |
| Extra parking                      | _____     | _____              |
| Other buildings (barn, shed, etc.) | _____     | _____              |
| Special view                       | _____     | _____              |

Of what? \_\_\_\_\_

## The Interior

12. How many bedrooms *must* you have? \_\_\_\_\_ would you like to have? \_\_\_\_\_
13. How many bathrooms do you want? \_\_\_\_\_

14. How big would you like your house to be (square feet)? No less than \_\_\_\_\_  
 But no more than \_\_\_\_\_

15. What features do you want to have in your house?

|                         | Must have | Would Like to Have |
|-------------------------|-----------|--------------------|
| Air conditioning        | _____     | _____              |
| Wall-to-wall carpet     | _____     | _____              |
| Ceramic tile            | _____     | _____              |
| Hardwood floors         | _____     | _____              |
| Eat-in kitchen          | _____     | _____              |
| Separate dining room    | _____     | _____              |
| Formal living room      | _____     | _____              |
| Family room             | _____     | _____              |
| Greatroom               | _____     | _____              |
| Separate den or library | _____     | _____              |
| Basement                | _____     | _____              |
| Separate laundry room   | _____     | _____              |
| Fireplace               | _____     | _____              |
| Workshop                | _____     | _____              |
| No interior steps       | _____     | _____              |
| "In-law" apartment      | _____     | _____              |
| Spa in bathroom         | _____     | _____              |
| Lots of windows (light) | _____     | _____              |

**Community features**

16. Do you want to live in an area with a Community Association? \_\_\_\_\_yes \_\_\_\_\_no

17. What else do you want in your community?

|                               | Must have | Would like to have |
|-------------------------------|-----------|--------------------|
| Community pool                | _____     | _____              |
| Golf course                   | _____     | _____              |
| Basketball court              | _____     | _____              |
| Tennis courts                 | _____     | _____              |
| Gated community<br>or doorman | _____     | _____              |
| Clubhouse/activities          | _____     | _____              |

18. Are there any other special features or needs that you must consider when you're looking for a home?