



www.prdsforms.com

**PRDS® BUYER NEEDS AND WANTS ASSESSMENT**  
DESIGNED FOR USE WITH PRDS® FORMS



To better enable your Broker, including its Sales Associates (collectively, “**Agent**”), to help you in searching for and acquiring real property, please complete this **Buyer Needs and Wants Assessment** (“**Assessment**”) and give it to your Agent. This 2-page Assessment seeks information about your general preferences, needs, wants and concerns (collectively “**Preferences**”) to help narrow the search parameters. The accompanying **Buyer Update and Assessment of Identified Property** (“**Updated Assessment**”) seeks information about the specific Property you have identified that you wish to acquire. Please complete all sections of both forms to the best of your ability; it is not the Agent’s responsibility to complete these forms.

**CAUTION:** Depending upon your financial ability, current housing inventory and other market conditions, you may not be able to find property that meets all of your Preferences. Many buyers ultimately make compromises when choosing which property to acquire. It is your responsibility to determine whether any property meets some or all of your Preferences and how much you are willing to spend to acquire that property.

The information in this Assessment constitutes “**confidential information**” (including that which is defined in Civil Code Section 2079.13 et seq). Regardless of Agency Relationships, this Assessment will not be disclosed by Agent to anyone, including any potential seller, unless Buyer authorizes Agent to disclose any or all of the information contained in this Assessment to person(s) specified by Buyer.

**GENERAL PREFERENCES, NEEDS, WANTS AND CONCERNS:**

**A. Personal and Financial Information:**

1. Names of all Buyers: \_\_\_\_\_  
\_\_\_\_\_
2. Phone(s): \_\_\_\_\_
3. E-mail(s): \_\_\_\_\_  
\_\_\_\_\_
4. Preferred price range: \_\_\_\_\_
5. Amount & source of initial and down payments (e.g., gift, sale of stock): \_\_\_\_\_
6. Are you pre-approved for a loan? Yes ☐ No ☐ If Yes, please provide your lender’s contact information: \_\_\_\_\_ and promptly provide Agent with a copy of any pre-approval letter.
7. Type of financing (e.g., conventional, FHA/VA): \_\_\_\_\_
8. Any financial concerns or pressures? Yes ☐ No ☐ If Yes, please specify: \_\_\_\_\_  
\_\_\_\_\_
9. Why are you looking to buy at this time? \_\_\_\_\_  
\_\_\_\_\_
10. Do you need to sell any property before you are able to buy? Yes ☐ No ☐ If Yes, please identify that property: \_\_\_\_\_  
\_\_\_\_\_
11. Do you have any timing constraints on identifying a property and/or closing (e.g., 1031 exchange deadline)? \_\_\_\_\_  
\_\_\_\_\_
12. Do you intend to reside in the property? Yes ☐ No ☐ If No, is this an investment that you need to receive income from? Yes ☐ No ☐ If Yes, what is the range of preferred income? \_\_\_\_\_
13. Are you buying property for someone else? Yes ☐ No ☐ If Yes, please identify that person and indicate whether that person will be involved in the purchase: \_\_\_\_\_
14. Are you acting on behalf of a trust or other entity? Yes ☐ No ☐ If yes, please specify the name of the trust/ entity: \_\_\_\_\_ and promptly provide Agent with documentation establishing your authority to act.

## PRDS® BUYER NEEDS AND WANTS ASSESSMENT

### B. Property Preferences and Concerns:

1. Type of property (e.g., single-level, single-family, condo): \_\_\_\_\_
2. Number of bedrooms/baths: \_\_\_\_\_
3. Space or size range? \_\_\_\_\_
4. Important amenities? \_\_\_\_\_
5. Location including school district preferences? \_\_\_\_\_
6. List all of your priorities (exterior and interior): \_\_\_\_\_  
\_\_\_\_\_
7. List any future needs or uses for the property (exterior and interior): \_\_\_\_\_  
\_\_\_\_\_
8. List any other concerns or issues: \_\_\_\_\_  
\_\_\_\_\_

### C. Expertise and Past Experience:

1. List your licensing or other expertise (e.g. Realtor, Attorney, Construction) \_\_\_\_\_  
\_\_\_\_\_
2. List any experience with buying other property or are you a first-time buyer? \_\_\_\_\_  
\_\_\_\_\_
3. List any problems/concerns with prior transactions or properties? \_\_\_\_\_  
\_\_\_\_\_
4. List any claims history or lawsuits with other properties (e.g. water intrusion): \_\_\_\_\_  
\_\_\_\_\_
5. List any allergy issues or sensitivities (e.g., pollen, noise, odors): \_\_\_\_\_  
\_\_\_\_\_
6. List any Americans with Disabilities access issues or concerns \_\_\_\_\_  
\_\_\_\_\_
7. Any other Buyer concerns or issues? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**NOTE: If the information contained in this Assessment changes at any time, for any reason, you must notify your Agent promptly in writing. If you notify your Agent in writing of any changes, those changes are incorporated into this Assessment. Buyer acknowledges receipt of a copy of this 2-page form.**

Date: \_\_\_\_\_ Buyer Signature: \_\_\_\_\_

Buyer Name: \_\_\_\_\_

Date: \_\_\_\_\_ Buyer Signature: \_\_\_\_\_

Buyer Name: \_\_\_\_\_

## PRDS® BUYER UPDATE AND ASSESSMENT OF IDENTIFIED PROPERTY

Now that you have identified the Property you want to acquire, make sure that you review all of the information in the Buyer Needs and Wants Assessment that you previously completed to confirm that the Property meets your Preferences and/or to the extent that the Property does not meet your Preferences that you are still satisfied with your decision to acquire this Property.

In the event that you do not acquire this Property and intend to make an offer on another property, Agent encourages you to re-do this Buyer Update and Assessment of Identified Property for that property.

### PROPERTY SPECIFIC CONCERNS OR PROBLEMS

Property Address ("Property"): \_\_\_\_\_

1. Any changes in the information specified in the Buyer Needs and Wants Assessment? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. Any issues or concerns from your review of the Seller's Disclosure Packet and/or any documents/information that you have obtained from any source at any time? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. Any issues or concerns from your review of the Property? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. Any issues or concerns from your review of the neighborhood? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
5. Any issues or concerns from Part 1 of this Assessment that are applicable or not applicable to this Property? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
6. What are your desired present and/or future uses ("**Uses**") of this Property? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
7. What are your desired repairs, modifications, additions ("**Changes**") to this Property? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
8. Do you have any other issues or concerns with acquiring this Property? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**NOTE:** If the information contained in this Assessment changes at any time, for any reason, you must notify your Agent promptly in writing. If you notify your Agent in writing of any changes, those changes are incorporated into this Assessment. Buyer acknowledges receipt of a copy of this 1-page form

Buyer understands, acknowledges and agrees that Agent cannot guarantee that any property will meet any or all of Buyer's Preferences; it is Buyer's responsibility to determine to what extent the Property meets the Buyer's Preferences. Buyer is also responsible for contacting appropriate professionals and governmental entities regarding the viability of Buyer's intended Uses and/or Changes to the Property.

Date: \_\_\_\_\_ Buyer Signature: \_\_\_\_\_

Buyer Name: \_\_\_\_\_

Date: \_\_\_\_\_ Buyer Signature: \_\_\_\_\_

Buyer Name: \_\_\_\_\_