

# Prospect Equal Service Report

Date:		Sales Associate:		Office:	
<b>Prospect Information</b>					
Name:			Name:		
Address:			Address:		
Home phone:		Work phone:		Work phone:	
<input type="checkbox"/> Owns now	<input type="checkbox"/> Rents now	<input type="checkbox"/> Must sell	<input type="checkbox"/> Owns now	<input type="checkbox"/> Rents now	<input type="checkbox"/> Must sell
Race*		to purchase		Race*	
<p>*For affirmative marketing purposes. Information on prospect race is sought to assist in monitoring the firm's commitment to equal professional service. Article 10 of the NATIONAL ASSOCIATION OF REALTORS® Code of Ethics states in part: REALTORS® shall not deny equal professional services to any person for reasons of race, color, religion, sex, familial status, handicap or national origin. REALTORS® shall not be parties to any plan or agreement to discriminate against a person or persons on the basis of race, color, religion, sex, familial status, handicap or national origin.</p>					
Prospect came to us as a result of:		<input type="checkbox"/> Walk-in	<input type="checkbox"/> Past Customer	<input type="checkbox"/> Sign	<input type="checkbox"/> REALTOR.com
<input type="checkbox"/> Referral (source):		<input type="checkbox"/> Ad (source):	<input type="checkbox"/> Phone solicitation	<input type="checkbox"/> Mail solicitation	<input type="checkbox"/> Other Websites
<b>Prospect Needs and Wants</b>					
Prospect wishes to:		<input type="checkbox"/> Purchase	<input type="checkbox"/> Rent	Possession Date:	
Prospect's price range preference:		Purchase price range:		Rental (use rental form):	
Prospect requested locations:					
Type of home:		# of bedrooms:	# of baths:	<input type="checkbox"/> Dining room	<input type="checkbox"/> Family room
<input type="checkbox"/> Fireplace	<input type="checkbox"/> Garage	Other features:			
Does the prospect desire information regarding housing for older persons? <input type="checkbox"/> Yes <input type="checkbox"/> No					
If so, is any member of prospect's household over 55? <input type="checkbox"/> Yes <input type="checkbox"/> No					
<b>Service Provided</b>					
Was prospect asked questions regarding his/her finances? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, indicate information obtained.		Income:	Down payment:	Other (specify):	
Was prospect offered information on financing options? <input type="checkbox"/> Yes <input type="checkbox"/> No Indicate any rate information provided.		<input type="checkbox"/> Conventional/fixed rate	<input type="checkbox"/> Adjustable rate	<input type="checkbox"/> FHA/VA	<input type="checkbox"/> Other (specify):
Did you financially qualify the prospect? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not applicable If yes, attach worksheets. If yes, qualified purchase price:			Did you refer the prospect elsewhere for financial qualification? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not applicable If yes, to whom: If yes, qualified purchase price:		
<b>Contact Dates and Comments</b>					

Property Shown: Please complete page 2 of this form and attach any additional information needed.

