



NEW CLIENT QUESTIONNAIRE GOLD VA

Thank you for taking the time to complete this form. Completing this questionnaire will provide your Virtual Assistant an overview of your immediate and future business and set expectations for services. Our goal is to provide you solutions to your problems, save you time and help you grow your real estate business and increase your revenue. Please take your time and answer all questions honestly so we can suit your needs and prepare the best service for you. This document is required before we can begin to service your VA account.

Client Information: Start Date: _____ Virtual Assistant: _____

Service Level: Gold Elite VA (\$697) Gold Elite (\$297) Gold Club VA (\$59)
(Gold Elite VA – up to 25 hours/month, Gold Elite - Purchase Hours, Gold Club VA – Purchase hours)

Last Name: _____ First: _____ M.I. _____

Spouse/Partner Last Name: _____ First: _____ M.I. _____

Street Address: _____ Apt. /Unit #: _____

City: _____ State: _____ ZIP: _____

Home Phone: _____ Cell: _____ Business: _____

E-mail Address: _____ Fax/Efax: _____

Company Name: _____ Occupation: _____

Will you be the main contact for the Virtual Assistant Services or an employee/assistant in your office? I will be the main contact: Yes _____ No _____ If No, please provide main contact information.

Last Name: _____ First: _____ Phone: _____

Email: _____ Fax/Efax: _____

What is your preferred method of contact? Phone: _____ Email: _____

Search Criteria

Please list search criteria for FSBOs (i.e. county, city, zip code, price range, etc.). Check the options below that apply to your area of focus.

Area of Focus:

OPTION 1 Counties (Recommended):

We like start with counties because they yield the most leads and cover a larger area. If you're going to focus only on the counites provided you will not need to provide any cities or zip codes. Unlike with your Gold Club Daily Lead emails that only allow 2 counties you can list as many as you would like.

Counties: _____

If you're going to exclude specific areas within your counties list them here.

OPTION 2 Cities:

If you would like to add cities outside of your counties or if you would like to be a little more specific and only use cities you can add cities here. If any cities fall within your counties listed above you do not need to add them. You can list as many as you would like.

Cities: _____

If you're going to exclude specific areas within your cities list them here.

OPTION 3 Zip Codes:

Using zip codes really narrows down your area by neighborhood this will allow you to be as specific as possible. If you would like to add any other zip codes outside of your counites and cities provided; or if you would only like for us to focus only on zip codes list them here. If any zip codes fall within the counties or cities listed above you do not need to add them.

Zip Codes: _____

Additional Notes about area of focus:

PROPERTY TYPES:

Single Family Multi-Family Townhome/Condo

Land Manufactured Homes Mobile Home

Rehab (We do not have a specific site for rebabs)

Minimum Price: _____

Maximum Price: _____

Square Footage: _____

Number of Bedrooms: _____

Number of Bathrooms: _____

Please check if you DO NOT wish us to source leads for you.

Additional Notes Property Types, Price Range, Square footage, etc.:

What area code would you prefer we use to make your FSBO calls?

If this is not available what would your second option be?

How many FSBO Property Information Sheets do you wish to receive on a weekly basis?

(We cannot guarantee the amount of leads you will receive. However, we do try to obtain at minimum 1 lead per hour of calls made. Upon completion of Seller lead sheets will be found in your DREAMS account.)

What services do you wish for your Eagle VA do for other than finding FSBO's within your search criteria and making seller calls?

Please note your VA will not negotiate any deals with sellers or buyers or explain details of your process or intentions of buying homes to a seller.

Investor Responsibility

Upon beginning my VA Service, I agree to the following:

_ Work one-on-one with my VA to help them fully understand my expectations to best utilize the service and systems.

Keep open line of communication with my VA.

Respond to my VA's emails with any questions or concerns they may have.

I will communicate immediately any issues with my VA to a supervisor.

Provide a broad criteria range to allow my VA to find FSBOs in my area.

I will not limit price range, types of houses or areas too much.

Follow-up with lead sheets

I will provide and/or share any new resources to my VA as I discover them to better service me.

Furnish my VA with as many leads as possible to improve quality and reduce operating costs. I understand the more leads I furnish the better-quality prospects I will receive and the less research time my VA will use.

Student Signature: _____