

COI Fact Sheet

Ask Questions to Discover Needs

Name: _____

Address: _____

Phone: _____ Email: _____

Preferred communication: Phone Email Print Mail

How do you know this person?:

Date of Closing: _____ Referred by: _____ Other: _____

Personal Information:

Spouse:

Children:

Things to Know:

Current Home:

Own: _____ Rent: _____ Date: _____

Description:

Dream Home:
