

NATIONAL ASSOCIATION OF REALTORS®

Prospect Equal Service Report

Date:	Sales Associate:	Office:	
Prospect Information			
Name:		Name:	
Address:		Address:	
Home Phone:		Work Phone:	
Owns Now <input type="checkbox"/>	Rents Now <input type="checkbox"/>	Must Sell To	Must Sell To
Race *		Purchase <input type="checkbox"/>	Purchase <input type="checkbox"/>
<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: REALTORS® shall not deny equal professional services to any person for reasons of race, color, religion, sex, familial status, handicap, or national origin. REALTORS(R) 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>			
	Walk in <input type="checkbox"/>	Past Customer <input type="checkbox"/>	Sign <input type="checkbox"/>
Referral <input type="checkbox"/>	Ad <input type="checkbox"/> (Source)	Phone Solicitation <input type="checkbox"/>	Mail Solicitation <input type="checkbox"/>
Prospect Needs and Wants			
Prospect wishes to:	Purchase <input type="checkbox"/>	Rent <input type="checkbox"/>	Possession Date:
Prospect's price range preference:	Purchase price range:		Rental: (use rental form)
Prospect requested locations:			
Type of home:	# of bedrooms	# of baths	Dining Room <input type="checkbox"/>
Fireplace <input type="checkbox"/>	Garage <input type="checkbox"/>	Other features:	
Does prospect desire information regarding housing for older persons? <input type="checkbox"/>			
If so, is any member of prospect's household over 55? <input type="checkbox"/>			
Service Provided			
Was prospect asked questions regarding his/her finances? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, indicate information obtained	Income	Down payment	Other (specify)
Was prospect offered information on financing options? Yes <input type="checkbox"/> No <input type="checkbox"/> Indicate any rate information provided	Conventional/fixed rate	Adjustable rate	FHA/VA
Did you financially qualify the prospect? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, attach worksheets. If yes, qualified purchase price:		Did you refer the prospect elsewhere for financial qualification? Yes <input type="checkbox"/> No <input type="checkbox"/> Not Applicable <input type="checkbox"/> If yes, to whom: If yes, qualified purchase price:	
Contact dates and comments?			
PROPERTY SHOWN - Please complete the other side of this form and attach additional information needed			

Property Shown

PART 1 - Did the prospect initially request information on or ask to view any specific property(s)? (Requests made prior to assistance being provided to the prospect.) ?

If yes, list address for each request. Include street address, unit # and community. Use additional sheets if necessary.	Price	Was property shown?	If shown, buyer's comments indicating preferences. If not, why?	Was any written information provided?

PART 2 - Were additional properties or areas offered to the prospect for general consideration? List areas or properties.

Was a computer generated list or other list of properties provided? Describe and attach.

If none, explain.

**PART 3 - List properties shown or offered for consideration, including those selected by prospect. Include street address, unit #, and community. Use additional sheets, if necessary. In the first column, indicate who selected the property:
P = Prospect A = Real Estate Agent**

Price	Was property shown?	If shown, buyer's comments indicating preferences. If no, why?	Was written information on property provided?

Disposition

Please list materials (such as REALTOR® Home Guide) provided.