[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Add or remove table rows to fit your needs. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Estate agency client intake form

New client - whether buying, selling, letting or renting, get it right first time.

Client details

Full name	[Full name]
Phone	[Phone]
Email	[Email]
Client type	[Buyer / seller / landlord / tenant]
Requirements	[e.g. 2-bed flat, max £X, areas]
Budget	[£ amount]
Timescale	[e.g. 3 months]
Mortgage / funding status	[e.g. AIP in place]
ID verified	[Y/N - document ref]

Sign-off

Agent	Client	Date