

New Client Intake Form Sample for Real Estate Agents

Streamline your onboarding process with this **new client intake form sample** tailored specifically for real estate agents. Designed to capture essential client information efficiently, it helps agents stay organized and provide personalized service. Use this form to enhance communication and ensure a smooth transaction from the start.

Personal Information

Full Name:

Email Address:

Phone Number:

Preferred Contact Method:

Email

Property Preferences

Type of Property Interested In:

Single Family Home

Preferred Location(s):

Budget Range:

Minimum Number of Bedrooms:

Minimum Number of Bathrooms:

Additional Information

Ideal Move-In Date:

Other Preferences & Comments:

Submit