REWARDING HEROES · ARIZONA HEALTHCARE REAL ESTATE GUIDE

Healthcare Real Estate Decision Worksheet

Use this worksheet to organize your situation, financial readiness, priorities, and Rewarding Heroes questions before your first consultation. This is a planning tool — not an application or commitment.

1 SECTION A — YOUR CURRENT SITUATION

Check all that apply:

- ☐ Buying first home
- ☐ Buying another home
- ☐ Selling
- ☐ Selling and buying
- ☐ Relocating
- ☐ Starting a new job
- ☐ Interested in new construction
- ☐ Considering investment property
- ☐ Not sure yet

Notes

2 SECTION B — FINANCIAL READINESS

Comfortable monthly housing target	$ _____	Available down-payment funds	$ _____
Estimated closing-cost funds	$ _____	Emergency reserves after closing	$ _____
Current monthly housing payment	$ _____	Major monthly obligations (car, debt, etc.)	$ _____

Income type(s) — check all that apply:

- ☐ Salary
- ☐ Hourly (fixed hours)
- ☐ Hourly (variable hours)
- ☐ Overtime
- ☐ Bonus
- ☐ Multiple jobs
- ☐ New or future employment contract
- ☐ Other lender-reviewed income
- ☐

> Ask a licensed mortgage professional what income can actually be used for qualification before setting your purchase budget.

Notes — what you already know, and what you still need to confirm

Equal Housing Opportunity. REALTOR® is brokered by HomeSmart. This worksheet is a planning tool for general educational purposes only — not an application, offer, loan quote, or commitment, and not legal, financial, tax, or real estate advice. Program availability, eligibility, terms, and compensation may vary and are established through written agreements. Not a solicitation if your property is listed.

REALTOR® EQUAL HOUSING OPPORTUNITY

3 SECTION C — HOME & LOCATION PRIORITIES

Rate each from 1 (low priority) to 5 (high priority):

	1 2 3 4 5		1 2 3 4 5
Purchase price	☐☐☐☐☐	HOA community	☐☐☐☐☐
Monthly cost	☐☐☐☐☐	New construction	☐☐☐☐☐
Proximity to work location	☐☐☐☐☐	Lock-and-leave convenience	☐☐☐☐☐
Approximate travel distance	☐☐☐☐☐	Low maintenance requirements	☐☐☐☐☐
Home size	☐☐☐☐☐	Community amenities	☐☐☐☐☐
Single-story living	☐☐☐☐☐	Access to major roads	☐☐☐☐☐
Yard	☐☐☐☐☐	Move-in timing	☐☐☐☐☐
Pool	☐☐☐☐☐		

Notes — tradeoffs you are weighing, plus questions for your agent or lender

Equal Housing Opportunity. REALTOR® is brokered by HomeSmart. This worksheet is a planning tool for general educational purposes only — not an application, offer, loan quote, or commitment, and not legal, financial, tax, or real estate advice. Program availability, eligibility, terms, and compensation may vary and are established through written agreements. Not a solicitation if your property is listed.

4 SECTION D — REWARDING HEROES QUESTIONS

Bring these questions to your Rewarding Heroes Consultation. Write the answers you receive in the space below each one.

01 Does my healthcare role fall within current program eligibility?

02 What representation services are included?

03 What compensation would apply to my transaction?

04 What would I personally be responsible for under my written agreement?

05 Is another party offering compensation or concessions?

06 If buying new construction, what builder compensation is available?

07 Does the three-phase inspection or local-move option apply?

08 What conditions or limitations should I understand?

Notes — answers, dates, and next steps

Equal Housing Opportunity. Real estate services are brokered by HomeSmart. This worksheet is a planning tool for general educational purposes only — not an application, offer, loan quote, or commitment, and not legal, financial, tax, or real estate advice. Program availability, eligibility, terms, and compensation may vary and are established through written agreements. Not a solicitation if your property is listed.

REALTOR®

EQUAL HOUSING OPPORTUNITY