



# BUYER FINANCIAL AND PERSONAL INFORMATION

(C.A.R. Form BFPI, 7/24)

1. **PARTIES:** \_\_\_\_\_ (“Buyer”),  
and \_\_\_\_\_ (“Broker”)  
have entered into a Buyer Representation Agreement, dated \_\_\_\_\_, beginning on \_\_\_\_\_ (date) (“Representation Agreement”) for the acquisition of property (“Property”), as described therein.
2. **BUYER'S FINANCIAL AND PERSONAL INFORMATION:** Buyer and Broker agree that it is beneficial to both if Buyer identifies, in writing, Buyer's financial condition and personal information (“Personal Information”) that Broker can use in assessing and identifying properties that may be satisfactory to Buyer. If Buyer does not qualify to purchase the type of property for which Buyer is interested, Broker and Buyer may mutually alter the terms of the Representation Agreement, or Broker may cancel that agreement.
3. **PROPERTY FINANCING INFORMATION** (where applicable, check all that apply):
  - A. **Amount of deposit available:** \$ \_\_\_\_\_
  - B. **Amount of down payment available:** \$ \_\_\_\_\_
  - C. **Source(s) of deposit and down payment:**  Savings (cash in bank)  Retirement account  Gift  Loan  Assistance program,  Sale of existing property ( Already sold,  Already in contract,  Not yet listed),  Other \_\_\_\_\_
  - D. **Amount of additional funds available for broker compensation and closing costs:** \$ \_\_\_\_\_
  - E. **Source of additional funds:** \_\_\_\_\_
  - F. **Maximum Loan Amount:** \$ \_\_\_\_\_
  - G. **Lender Information:**
    - (1) Company Name: \_\_\_\_\_
    - (2) Loan Officer name: \_\_\_\_\_
    - (3) Phone: \_\_\_\_\_, Email: \_\_\_\_\_
    - (4)  Pre-qualified,  Pre-approved,  Fully underwritten pre-approval
  - H. **Financing type:**  Conventional,  FHA,  VA,  Other \_\_\_\_\_  
**NOTE:** If Buyer's preferred financing or lender does not allow Buyer to pay certain closing costs, including broker compensation, Buyer will need to request that Seller compensate Buyer's Broker.
  - I. **Maximum monthly housing expense** (for PITI, HOA fees,  other \_\_\_\_\_): \$ \_\_\_\_\_
4. **OTHER FINANCIAL INFORMATION:**
  - A.  1031 exchange,  Expected legal settlement,  Expected inheritance
  - B.  Buyer intends to include a contingency to sell another property as part of any transaction (see C.A.R. Form COP)
  - C. Other: \_\_\_\_\_
5. **PERSONAL INFORMATION:**
  - A. **Current Housing:**  Own  Currently Rent  Other \_\_\_\_\_
  - B. **Property Ownership Experience:**  First time buyer,  # of properties previously purchased:  One,  2-5,  More than 5,  # of properties currently owned: \_\_\_\_\_
  - C. **Real estate Related Experience:**  R.E. broker  R.E. salesperson  Contractor  R.E Investor  Trade (ex. Plumber, electrician, landscaper): \_\_\_\_\_
  - D. **Time Constraints:** (e.g. Job relocation, sale of existing home, school start date): \_\_\_\_\_
  - E. **Reasons for Purchase:** \_\_\_\_\_
  - F. **Other:** \_\_\_\_\_
6. **CONFIDENTIALITY:** The financial and personal information identified herein are intended as confidential information as that term is defined in Civil Code § 2079.13 et seq. Regardless of agency relationship in any transaction involving Buyer and Broker, the information will not be disclosed to any seller or seller's agent except as Buyer authorizes Broker.
7. **IDENTIFICATION OF AND CHANGES TO FINANCIAL AND PERSONAL INFORMATION:** Buyer represents that Buyer is not aware of any other financial and personal information that would affect Buyer's effort to acquire property. Buyer has not made any verbal representations to Broker of additional financial and personal information. Buyer agrees to notify Broker, in writing, of any change to Buyer's financial and personal information.

By signing below, Buyer understands, acknowledges and that it is Buyer's responsibility to determine to what extent any property meets Buyer's financial and personal needs and abilities.

Buyer has read, understands, and received a Copy of this Buyer Financial and Personal Information. Buyer is encouraged to read it carefully.

Buyer \_\_\_\_\_ Date: \_\_\_\_\_

Buyer \_\_\_\_\_ Date: \_\_\_\_\_

I acknowledge receipt of a copy of this Buyer Financial and Personal Information.

Real Estate Broker (Firm) \_\_\_\_\_ DRE Lic# \_\_\_\_\_

By (Agent) \_\_\_\_\_ DRE Lic# \_\_\_\_\_ Date: \_\_\_\_\_

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