



## Straight-forward Questions to “break the ice” Template

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**First, we highly recommend that you read their profile.** Then use the following template questions to ask your potential co-borrowers and provide your own answers below. If you prefer a more formal exchange of answers, you may request that they fill-out this template for discussion when you meet in person.

These questions are focused for members whose goal is: **Co-Borrower Primary Residence**

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1. Where do you live now—and do you see yourself here for a while? Is co-borrowing part of your plan to relocate?

2. Do you work from home, or outside?

3. What are your future plans as far as work or your source of income? Are you planning to make any changes?

4. I saw you mentioned [story detail] on your profile—what’s the backstory behind that?

Story detail on profile: \_\_\_\_\_

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Backstory answer below:



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5. What is your pre-qualification amount?

6. What's your comfort zone on price? How much do you make in a month?

7. What type of home style do you like?

8. How should we split household expenses?

9. What's your biggest worry about co-ownership?

10. How long do you imagine owning together?



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Note: Follow-up whether there’s a second meeting. We have a set of Advanced Questions that you can use as a template to shape your next conversation.