

PARTNER INTELLIGENCE, CLIENT VERSION, INTAKE FORM

PARTNER INTELLIGENCE BRIEF

CLIENT VERSION

Fill this out and send it to our team. We'll build a rapport brief and send it back as a designed PDF.

HOW TO USE THIS FORM

Fill this out digitally or by hand, then send the completed form to:

fairwaywestmarketing@fairwaymc.com

Our team will build the client's rapport brief and email it back to you as a designed PDF.

CLIENT RESEARCH IS DIFFERENT

This form is about a client, not a business partner. Our research focuses on rapport, communication style, and publicly available property context only. No protected class references, no credit inferences, no loan program recommendations. Estimates are always labeled as estimates, never treated as financial advice or fact.

CLIENT INTENT · Required. This shapes the entire brief.

☐ Buyer

☐ Seller

☐ Both Buyer and Seller

☐ Refinance / Existing Homeowner

01

REQUESTED BY

YOUR NAME

EMAIL · Where we'll send the finished brief

YOUR ROLE · Fairway LO / agent partner / other

YOUR BRANCH / LOCATION

WHEN YOU'D LIKE TO HAVE THE BRIEF · Optional

GOAL OF THIS MEETING

02

CLIENT INFORMATION

CLIENT FULL NAME

REFERRAL SOURCE · Agent, past client, event, self-generated, etc.

CITY / STATE THEY'RE BUYING IN

CURRENT HOME / PROPERTY ADDRESS · Used to research publicly available property records (Zillow, Redfin, county assessor)

LOAN PURPOSE · purchase / refi / cash-out / HELOC / construction

BUYER TYPE · first-time / move-up / investor / downsizer

LOAN AMOUNT / PRICE RANGE · If known

APPLICATION STATUS · early / pre-approval / under contract / closing

WEBSITE URL

LINKEDIN URL

INSTAGRAM URL

FACEBOOK URL

OTHER KNOWN LINKS · Only what's publicly available

03

RELATIONSHIP CONTEXT

HOW DID YOU HEAR ABOUT THEM?

MUTUAL CONNECTIONS

HAVE YOU MET BEFORE?

- ☐ No, first time ☐ Briefly, in passing ☐ Yes, not professionally ☐ Yes, worked together

CURRENTLY WORKING WITH ANOTHER LENDER?

- ☐ Unknown ☐ Yes, exclusive ☐ Yes, multiple ☐ No, open

WHAT YOU ALREADY KNOW ABOUT THEM

RECENT INTERACTION OR REASON FOR REACHING OUT

04

RESEARCH FOCUS

Check what you'd like us to focus on. Rapport and connection only, never financial inferences.

- | | |
|---|--|
| ☐ Professional Background (public) | ☐ Community Involvement |
| ☐ Personal Interests (public only) | ☐ Property Context (current home) |
| ☐ Communication Style Read | ☐ Rapport-Building Talking Points |

05

OUTPUT PREFERENCE

Check the components you'd like in the brief. We'll send it back as a designed PDF.

- | | |
|--|--|
| ☐ Client Snapshot | ☐ Property Snapshot |
| ☐ Conversation Starters | ☐ Meeting Prep Notes |
| ☐ Questions to Ask | ☐ Suggested Follow-up Message |

NEXT STEPS

SEND US YOUR COMPLETED FORM

1. Save this completed form as a PDF (File → Save, or File → Export).
2. Email the PDF to fairwaywestmarketing@fairwaymc.com
3. Our team will build the client's rapport brief and email it back as a designed PDF.

Questions? Reach us at fairwaywestmarketing@fairwaymc.com