

# EQUAL SERVICE REPORT FORMS

## PROSPECT EQUAL SERVICE REPORT

### SALES

The National Association of REALTORS® is committed to the provision of equal housing opportunities. The Prospect Equal Service Report is designed to incorporate basic prospect information, needs and wants, properties shown, and a record of service provided. This report will help you keep uniform records for all prospects. The form is not a checklist of service to be provided; the level and type of service you provide will be determined by you firm and should be consistent. The report will, however, document your consistency and provide two fair housing tools:

1. It provides you with evidence of your firm's compliance with the law, which may become an invaluable defense in the event you become involved in a housing discrimination complaint.
2. It allows you and your agents to monitor and review compliance with your fair housing policy and make corrections before you get involved in a discrimination complaint.

You should complete or update the report during or following each contact with the prospect. The report is composed of the following components:

**Prospect Information** (Space is provided for two adults in a household).

Recording race-Recording the race or national origin of a prospect is invaluable in your efforts to document equal professional service and to monitor your firm's compliance with the law and your equal opportunity policy.

**Prospect Needs and Wants** (NOTE: the Prospect Equal Service Report for Rentals is recommended for rental prospects).

Housing for older persons-If you receive a request for housing for older persons, record whether a member of the household is over age 55.

**Service Provided**-Complete the questions financially qualifying the prospect, attaching qualification forms, if any. Then list your contact dates with the prospect.

**Property Shown**-Complete the three sections on the back of the report. Use space provided to indicate prospect's comments clarifying needs and wants.

Part 1-Record the prospect's initial requests for specific properties and whether these were shown.

Part 2-List any properties or area offered for general considerations, such as a computer printout or a specific community.

Part 3-List properties offered or shown by address. Space is provided to indicate who selected the property shown.

**Disposition**-Indicate whether the prospect bought property or that no further service was provided. List additional materials, such as community profiles or the Home Guide, that you provided the prospect.

Finally, attach financial qualifying forms, copies of listing printouts, and notes to this report.



This is a form was created by the National Association of REALTORS®.



**NATIONAL ASSOCIATION OF REALTORS®**  
Prospect Equal Service Report

**Date:** \_\_\_\_\_ **Sales Associate:** \_\_\_\_\_ **Office:** \_\_\_\_\_

**PROSPECT INFORMATION**

Name:			Name:		
Address:			Address:		
Home Phone:		Work Phone:	Home Phone:		Work Phone:
Owns Now	Rents Now	Must sell to purchase?	Owns Now?	Rents Now ?	Must sell to purchase?
Race: *			Race: *		
*For Affirmative Marketing purposes. Information on prospect race is sought to assist in the monitoring of the firm's commitment to equal professional service. Article 10 of the NATIONAL ASSOCIATION OF REALTOR® Code of Ethics states: REALTORS® shall not deny equal professional services to any person for reasons of race, color, religion, sex, familial status, handicap, or national origin. REALTORS® shall not be parties to any plan or agreement to discriminate against a person or persons on the basis of race, color, religion, sex, familial status, handicap, or natural origin.					
Prospect came to us as a result of		Walk In	Past Customer	Sign	Other
Referral		Ad (source)	Phone solicitation	Mail Solicitation	

**PROSPECT NEEDS AND WANTS**

Prospect wishes to	purchase	rent	possession date
Prospect's price range preference	Purchase price range:	rental:	(use from rental)
Prospect requested locations:			
Type of home:	# Bedrooms:	# Baths:	Dining Room Family
Does prospect desire information regarding Housing for Older Persons? If so, is any member of prospect's household over 55?			

**SERVICE PROVIDED**

Was prospect asked questions regarding his/her finances? If yes, indicate information obtained.	Income	Down Payment	Other (specify)	
Was prospect offered information on financing options? Indicate any rate information provided	Conventional /fixed rate	Adjustable rate	FHA/VA	other (specify)
Did you financially qualify the prospect? ___Yes ___No ___not applicable if yes, attach worksheets if yes, Qualified Purchase Price:	Did you refer the prospect elsewhere for financial qualification? ___Yes ___No ___not applicable if yes, attach worksheets if yes, Qualified Purchase Price:			

Contact dates and comments?

PROPERTY SHOWN - please complete the other side of this form and attach additional information needed

**PROPERTY SHOWN**

**PART 1 - Did the prospect initially request information on or ask to view any specific property(s)? (Request made prior to assistance being provided to the prospect.)**

If yes, list address for each request, include street address, unit # and community. Use additional sheets if necessary.	Price	Was property shown?	If shown, Buyer's comments indicating preferences. If not, why not.	Was any written information provided?

**PART 2 - Where additional properties or areas offered to the prospect for general consideration? List areas or properties**

**Was a computer generated or other list of properties provided? Describe and attach**


If none, explain.

**PART 3 - List properties shown or offered for consideration, including those selected by the prospect. Include street address, unit #, and community. Use additional sheets if necessary. In the first column indicate who selected the property - P - prospect, A - real estate agent**

	Price	Was property shown?	If shown, Buyer's comments indicating preferences. If not, why not.	Was any written information provided?

**DISPOSITION**

Please list materials (such as the REALTOR® Home Guide) provided: