

Mortgage Broker Buyer's Agent Screening Cheat Sheet

6 quick questions to help you screen a buyer's agent before referring your client.

Use this checklist to make sure the buyer's agent is organised, credible and able to protect your client throughout the buying process.

6 Screening Questions

1

Are they licensed, insured and compliant?

Ask for their real estate licence number, PI insurance confirmation, service agreement and compliance process.

2

Do they have a referral pack you can pass on?

A good buyer's agent should have a service overview, fee structure, FAQs, licence details and clear information for your client.

3

Do they understand the client's finance position and work with the broker?

They should understand borrowing capacity, deposit, pre-approval limits, holding costs and finance conditions before recommending property.

4

Can they explain how they source, assess and negotiate opportunities?

They should show a clear process for finding properties, assessing fair value and negotiating with strategy.

5

Can they show an example property report, due diligence process or portfolio tool?

Look for evidence of how they assess value, risk, rental return, growth drivers and long-term strategy.

6

Do they have real buying and investment experience they can prove?

Ask about their own investment experience as well as recent client results, case studies or deals they have helped secure.



Before Referring, Ask For:



Real estate licence number



Professional indemnity insurance confirmation



Service agreement



Fee structure



Example client process



Example property report



Due diligence checklist



Referral agreement, if applicable



Clear communication process



Post-purchase support process

A good buyer's agent should be able to clearly explain what they buy, why they buy it, how they protect the client, and how they communicate with you as the broker.