

Suggested Items to Have Available for Your Initial Consultation with Scott



Prior to our Initial Consultation, it is helpful to gather the following items:

- a) Map of your Property: Usually something you would have within your original home settlement package, or when you may have erected a fence, pool, or similar outbuilding. It shows the “footprint” of the home and it used determine property lines, easements, and building restriction lines.
- b) Neighborhood Covenant and/or Restriction Information: This information would be a part of any homeowner’s association package, and may not be applicable depending on the location of your home.
- c) Drawings, Sketches, and/or Photographs of Designs You Like: Have available any pictures of home exteriors you have seen that you find aesthetically pleasing. Try looking in design books, magazines or on the internet (<http://www.homeplans.com> or <http://www.robinsonplans.com>). If you have made any sketches or design ideas on your own, include them as well. We like to get an idea of where you are coming from and where you would like to go.
- d) Wants, Needs, Dreams: Put together a list of things you are positive you need or want; things you think you might want, and things you wish you could have. You may be surprised to find that some of the updates or luxury items you may have thought cost-prohibitive will fit quite nicely into your budget. We will be doing some brainstorming on ideas during the consultation, and it is nice to have your ideas and requirements at your fingertips for easy reference.

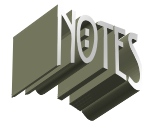


Let’s Identify Details and Your Priorities

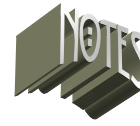
Project Priorities: Top five, ranked in order of importance from 1(highest) to 5(lowest)

Examples: siding material, total cost, style, outside living area, finished living space, etc.

a) Most Important



b) Second Most Important:



c) Third Most Important:

d) Fourth Most Important:

e) Fifth Most Important:

Budget—Financing--Timing

Projected Budget Range: \$ _____ - _____

Possible Financing Options

- a. Have enough Cash for project _____
- b. Cash-out refinance _____
- c. Equity in current home _____
- d. Home equity loan/2nd mortgage _____

Estimated/Preferred start of project: _____

Basic Assessment Items

Possible Future Plans (over the next 10 yrs.)

- e. Planning to start a family _____
- f. Planning on expanding family size _____

- g. Downsizing resident size _____
- h. Planning to move from the area _____
- i. Vacation/Retirement _____
- j. Entertain Family & Friends _____

Overall Functional Needs

- k. Gathering/Entertaining space needed _____
(e.g. Family Room)
- l. Private/Personal space is needed _____
(e.g. Bedrooms)
- m. Work at home space is needed _____
(e.g. separate den or office)
- n. The basic systems of the home _____
(HVAC heating/cooling, electrical, plumbing)

- o. Home appliances and fixtures _____
(kitchen appliances, vanity light fixtures, etc.)

Overall Aesthetics of New Home

- p. Home Exterior Style _____
- q. Home Interior Style _____
- r. General Curb Appeal _____