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CLIENT PRE SCREENING / CONTACT INFORMATION

Name(s) _____ / _____

Current Address _____ City _____ State _____

Phone Number(s) _____ Email(s) _____

- Project type checkboxes: New Home, Home Addition, Restoration, Commercial Space, Renovations, Other

Location of Project _____

Do you own the lot? Yes No

Have you built a custom home before? Yes No

What is your primary reason for building a new home?

- Reasons for building: Dream home, More space, Downsizing, Relocation

What is your desired timeline for project completion (move in date)

- Timeline options: 6 months from now, 12 months from now, No date set

What is your approximate budget? _____

Will you be financing this project? Yes No

What is the approximate square footage? _____

How many floors? One-story (Ranch) Two-story

How many? Bedrooms _____ Bathrooms _____

Garage Size? 2 Car 3 Car 4+ Car

What "style" or "overall look" of the home do you want?

- Home styles: Modern, Traditional, Farmhouse/Ranch, Craftsman, Cottage/Bungalow, Industrial, Other

Any architectural features you hope to include?

- Architectural features: Fireplace, Cathedral Ceilings, 3-Season Room, Other

Any building materials you hope to include?

- Building materials: Metal Roofing, Brick, Natural/Cultured Stone, Other

Do any family members or frequent visitors have special needs?

- Special needs: Handicap (ADA), Mobility, Other

Would you like to plan for future projects?

- Future projects: Finished basement, Detached garage/barn, Pool, Other

Office use : Follow up phone call (date) _____ Start Plans (fee paid) _____ (Date)