Project & Property Notes

A calm place to gather the context that matters before a private meeting.

This optional worksheet organizes project direction, property context, timing, and conversation preferences. It does not determine feasibility or replace a project-specific conversation.

BUILD WITH INTENTION.

How to use this worksheet

A guide, not a test.

Mark only what feels useful. Leave anything that is still taking shape. You can bring these pages to a private meeting or use them simply to clarify your own thoughts.

Use it for

Organizing your goals, property context, conversations, and questions.

It is not

A budget worksheet, a feasibility assessment, or a commitment to proceed.

NO FORM IS REQUIRED TO USE THIS WORKSHEET.

What are you considering?

1 Project type

Mark any description that is useful for the conversation.

- ☐ Custom Home
- ☐ Addition
- ☐ Not sure yet
- ☐ Whole-Home Remodel
- ☐ Design-Build

2 Your vision

What would make this project feel right for you?

What context should shape the conversation?

3 Project property

- ☐ I own land for a new home
- ☐ I have an existing home to remodel
- ☐ I am looking for land
- ☐ Not sure yet

4 Project timeline

- ☐ Ready to begin
- ☐ In 6–12 months
- ☐ In 3–6 months
- ☐ Exploring possibilities

5 Architect collaboration

Are you working with an architect?

- ☐ Yes
- ☐ No
- ☐ Not sure yet

Set up the next conversation.

6 **Contact preference**

- ☐ Phone call
- ☐ Text message
- ☐ Email
- ☐ Either phone or email

Preferred date or timing for a conversation:

7 **Questions to bring**

What do you want to understand, decide, or explore first?

When you are ready

Request a private meeting and bring the notes, images, and questions that will make the conversation more useful.

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