



## **Initial Consultation Meeting Questionnaire**

To begin your new home process, we will need to meet with you to listen to your hopes and dreams. We will need approximately 2 hours of your time for this meeting. These meetings usually take place at the Atkins Family Builders home that is either closest to your existing home or possibly the one we determine may be somewhat like the home you desire to build. Your meeting will be directly with the builder, Steve Atkins.

At Atkins Family Builders, we vow to:

- Decrease your home's energy needs
- Increase your home's future resale value through good design, quality materials and superior craftsmanship
- Understand your vision and dreams
- Help evaluate your needs and make those dreams a reality
- Be timely and efficient as we create your project
- Be dedicated to the success of the project
- Enjoy the entire process with you and create a "fun" experience

Once completed, the following pages will provide us with vital information to start your design and also, hopefully, inspire your thoughts on your future home. In short, we try to capture the essence of how you live so you will want to live in your new home for many years to come.

We will try to help determine everything about your new home, from the simplest and most obvious, such as the number of bedrooms and bathrooms, to less common features such as personal and public

entertainment areas, specialized storage space, and even the home's physical location and architectural style.

Before we start, we encourage you to invest some time thinking about your current lifestyle by filling out this "fun homework".

## **NOW LET'S GET STARTED**

Client Names (Legal names for the paperwork):

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Names you prefer to be addressed as:

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How long do you plan to live in this home?

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Do you have a timeline/schedule in mind for when to start construction?

When do you desire to complete construction?

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Are these rigid time constraints?

Have you built a home previously? \_\_\_\_\_ How many?

Did you build or remodel the home you currently live in?

What went well?

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What areas could have used improvement?

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Our method for sorting out what is most important to *you* is for you to think about your new home, take time to create a wish list of what you'd like or *wish* to have and a separate list of what you *must have* to meet your family's needs. Prioritize these lists.

The "*wish*" list allows you to dream, while the "*must haves*" list keeps your feet on the ground. The process of creating the lists establishes expectations, minimizes impulsive decisions, and fosters an objective

balance between fantasy and reality. Together, your lists create the foundation for a focused search and the ultimate discovery of the home that best suits your lifestyle, going a long way toward assuring your satisfaction now and long into the future.

Consider the following guidelines to get you started:

- **Keep separate lists.** Maintain individual "*wish*" and "*must haves*" lists. Separate lists will help you recognize what you really *need* and help you prioritize everything else.
- **Start a clip file.** Supplement your lists with photos and articles from magazines, newspapers, and online resources to reinforce and illustrate your ideas, providing even greater detail for our designer. If you see a home down the street that catches your eye, maybe the dormer, the stone or the front entry that you really must have, snap a picture of it. Pictures of design features that you desire to incorporate in your home are great tools to communicate to our designer.
- **Think outside the kitchen.** In addition to the "glamour" rooms, keep in mind storage areas, laundry and service rooms, and family and entertainment spaces. These "additional spaces" are vitally important to the comfort of your family and critical to your ultimate satisfaction.
- **List your dislikes.** Keep track of the things that annoy you about your current home (as well as homes you've lived in, seen, or visited over the years) and promised yourself to avoid or change. Your new home is a chance for a fresh start, so take advantage of the opportunity. This third list, your "*dislikes*" is as important of a communication tool as the first two lists.
- **Prioritize.** Upon completing each list to your satisfaction, take an objective look at what's really needed and what you're willing to trade-off, for whatever reason. Prioritize each list and eliminate items that you know are unrealistic or unnecessary. Then transfer items low on the lists to separate lists of wants and needs that you can list as "*desires*" if the budget allows or to be planned for in the future.

List things you "**must have**" in your new home (and remember to prioritize/hottest items first).

List things you would like or "**wish**" to have in your new home (again prioritize). \_

List things you "**desire**" to add to the home if the budget allows (again prioritize). \_

List some things you "**dislike**" about your current home, or changes you would make. \_

### **YOUR FAMILY AND IT'S LIFESTYLE**

How many people will be living in your new household? What are their names, gender and age? Do they have any particular preferences, interests or special needs?

Do you entertain often? What kind of entertaining do you do – formal entertaining or family/friends entertaining?

Do you work at home or when you are home, do you spend a lot of time working?

How avidly do you watch TV? How many TV's do you want in the new home and where? Is a home theater important?

How many fireplaces do you want in the new home and where? What style and where?

Is a snack bar or wet bar important to have in or near the recreation room, kitchen, living room?

Do you like to entertain outdoors? Are you interested in an outdoor living area, deck, patio, outdoor cooking, outdoor kitchen, outdoor fireplace/fire pit, sport court, other outdoor activities?

Here is a list of rooms. Please check the ones you desire to have in your new home and in the column marked "Floor" denote what floor level you desire them to be on (first, second or lower level). If you don't have a strong preference to what floor that the room must go on, leave it blank. This will allow the designer some flexibility. You can add rooms to the list as necessary.

Next comes room size. Measure the rooms in your current residence that you desire to have in your new home. Let us know if the sizes of those rooms are as you desire or if you want your new rooms to be larger or smaller and by how much. One person's definition of a large master bedroom may be different than someone else's. This exercise will eliminate any confusion.

Room	Floor	Existing Size	New Size	Room	Floor	Existing Size	New Size
Foyer				Main bath			
Great room				Bedroom #2			
Living room				Bedroom #3			
Formal dining				Bedroom #4			
Den				Bedroom #5			
Office				Screen porch			
Kitchen				Bar			
Breakfast				Second kitchen			
Hearth room				Craft room			
Family room				Guest bedroom			
Mud room				Guest bath			
Laundry room				Sunroom			
Powder bath				Exercise			
Master bedroom				Theater room			
Master bath				Game room			
Master closet				Craft room			

**House size:**

Approximately how many square feet are there in your existing home?

\_\_\_\_\_

Approximately how many square feet do you want in your new home?

\_\_\_\_\_

Number of garage stalls? \_\_\_\_\_ How many garage doors and what sizes? \_\_\_\_\_

What is your existing home?

- Ranch
- 1 ½ story
- Two story

Is the lower level finished?

\_\_\_\_\_

What are you interested in for your new home?

- Ranch
- 1 ½ story
- Two story

Do you want the lower level finished in your new home?

\_\_\_\_\_

**HOW DO YOU SPEND YOUR TIME?**

How much time is spent in these areas of the home?

- Formal living and dining \_\_\_\_\_
- Family/recreation rooms \_\_\_\_\_
- Master suite
  - Do you consider the master bedroom to be a "retreat"?
  - Do you desire chair(s), TV, fireplace in the room?
- Master bath
  - Shower size?
  - Shower amenities (Rain head, shower tower, steam)?
  - Whirlpool/Soaking tub?

- Number of Vanities?
- Number of Sinks?
- Stool Compartmentalized?
- Bidet?
  
- Kitchen
  - How much do you use your kitchen?
  - Do you desire a “gourmet” kitchen?
  - Or, do you use the microwave more than the stove?
  - When you entertain, do people congregate in the kitchen?
  - Are they in your way?\_
  
- Bedrooms? \_\_\_\_\_
  
- Den/office? \_\_\_\_\_

### **WHAT FLAVOR DO YOU LIKE?**

#### **Sunlight/natural light:**

Some people can't get enough, while others get overwhelmed by a sunroom facing west. Are you a morning person or night person? What do you prefer?

#### **Architectural styling:**

Architectural styles – Please circle or describe for us your desired style: Traditional, Contemporary, Victorian, Tudor, Colonial, Salt Box, Cape Cod, Georgian, Shingle, Prairie, Craftsman, Bungalow, Tuscan, Mediterranean, French County

Not sure of the style? Take a drive through some developments and take some pictures of homes that appeal to you and add them to your clip file. If you can't find what you're looking for, we commonly design unique homes to fit your desires.

#### **Material selections:**



- Exterior materials you desire?
- What style of window do you like, casement or double hung windows?
- Do the windows have grids?
  - Just the front of the home or all sides?
- What kind and style of interior finishes are you looking for?
- What style of interior trim?
  - Stained, painted or both
  - Oak, cherry, maple, birch, or painted
  - Traditional, Colonial, Contemporary
- What types of flooring do you want in your new home?
  - Wood and where? \_\_\_\_\_
  - Carpet and where? \_\_\_\_\_
  - Stone and where? \_\_\_\_\_
  - Tile and where? \_\_\_\_\_
- What are you looking for in a staircase?
- Stair railing?
  - Wood, stained or painted
  - Wrought iron
  - Stair treads
  - Carpet, carpet runner, or wood?
- Cabinets painted or wood (maple, pine, birch)
- What type of countertops: solid surface, granite, plastic laminate and where?
- What type of fireplace are you looking for, gas or wood?

- Style of mantels, wood (stained or painted), tile, granite or masonry
- Style of hearth, stone brick tile

## **Budget:**

### **HERE IT COMES**

This is a scary word for most people. Budgets can be compared to paychecks –everybody has one, we just wish it were bigger and we commonly don't share its value with others.

If you are not sure what your budget is, a loan officer at your bank can help with assisting you to define what yours should be. If you don't have a relationship with your banker, we can suggest a few lenders that have gone above and beyond at meeting our clients expectations in past transactions. Let us know if you need a recommendation.

Designing and building a home requires aligning three elements that make up the "Budget Triangle".

We will guide you throughout the project on how to balance the triangle. Here is a simple diagram of the Budget Triangle.

### **Budget Triangle**

#### **What is that Amount \$**

Together you and your lender can establish a number that you are comfortable with.

Is this for just the home or the entire package (lot, landscaping, pond feature, special exterior lighting, driveway, furniture, built in sound system, projection TV, security system, appliances, wine cellar, patio, pool, well & septic)?

**Size:** Yes, size matters! It's not only the size, but the proportions. The more evenly we can distribute footage between floors, the more economical it will be. Your completed homework will greatly assist us in designing and building the right size home for your family and budget.

**Amenities:** Interior finishes like: Will your countertops be granite, solid surface or plastic laminate? Will your woodwork be oak, cherry or will it be painted? Exterior finishes like siding, masonry, windows plus many more play a huge roll in the final costs of your home.

As your design/build professionals, we will work with you to close the Budget Triangle, to align your needs, wants and desires with what your budget will afford. At times, this can be the most difficult aspect of building a new home but together we can work through this hurdle. At Atkins Family Builders, we strive to have all our proposals come within our client's budget.

We also feel that a key to successfully designing and building the home of your dreams is insuring every dollar is spent wisely.

**LET'S WRAP IT UP!**

How much time do you have to be involved in the design process? It is important to keep the process on track. We have found weekly progress meetings a useful tool. What days and time are most convenient for you?

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How do you prefer to have us communicate with you?

Home phone \_\_\_\_\_

Work phone

Cell phone \_\_\_\_\_

Home email -

Work email \_\_\_\_\_

Other \_\_\_\_\_

We have experienced that email works great for the majority of our clients. Having the freedom to write an email late at night while a thought is fresh on your mind, and the fact that a "trail" of communication can be easily saved are some benefits of email. Is email communication ok with you?

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## **Thank you**

As a design/build firm dedicated to making your housing dreams a reality, we are committed to providing you a home that is best suited to not only your family but one that will hold its resale value long into the future because of its construction and design.

We are now armed with a solid understanding of your particular wants, needs and desires. We can pinpoint the right house and features for you, delivering a home that suits your circumstances now and well into the future.

By you taking the time to finish this homework, what started as a rough collection of your dreams has evolved into a clear-cut set of expectations and priorities. At the same time, you have created a strong communication tool for our design and construction departments that will be of great assistance in the creation a home that meets your lifestyle and reflects all that you hoped for in a new home.

Remember, building should be a fun and enjoyable process.

At Atkins Family Builders, it is our desire to earn your trust and confidence to design and build the home of your dreams.

Working together, it will be a very rewarding process!

**On behalf of the entire Atkins Family Builders Team, Thank you!**

**<https://www.atkinsfamilybuilders.com/>**