# CLIENT INTAKE QUESTIONNAIRE

Collect only information needed for the project. Store completed questionnaires securely.

**CLIENT / PREFERRED CONTACT**

**CONSULTATION DATE**

**PROJECT ADDRESS**

**BEST TIME / METHOD TO REACH YOU**

## WHAT ARE YOU REMODELING, AND WHY NOW?

## TOP THREE GOALS / MUST-HAVES

**BUDGET RANGE / CONTINGENCY APPROACH**

**DESIRED START / COMPLETION CONSTRAINTS**

## CURRENT PROBLEMS / KNOWN DAMAGE / PRIOR WORK

**WHO APPROVES SCOPE / SELECTIONS?**

**OCCUPANTS / PETS / ACCESSIBILITY NEEDS**

# CLIENT INTAKE QUESTIONNAIRE

Use these answers to prepare a realistic discovery visit, not to promise pricing before investigation.

**PROJECT / JOB NUMBER**

**UPDATED BY / DATE**

## DISCOVERY DISCUSSION

- [ ] Project type, rooms and approximate dimensions are understood.
- [ ] Plans / designer status and association restrictions are discussed.
- [ ] Potential structural, utility or water-damage issues need investigation.
- [ ] Living arrangements, work hours, access and protection needs are discussed.
- [ ] Budget fit and priorities for tradeoffs are discussed.
- [ ] Permit / design responsibility and next steps are explained.

## WISH LIST VS. OPTIONAL WORK / SCOPE BOUNDARIES

## DOCUMENTS / PHOTOS REQUESTED BEFORE SITE VISIT

**NEXT MEETING / SITE VISIT**

**FOLLOW-UP OWNER / DUE DATE**