

Initial Design Checklist

General Property Info

- ☐ Property address: _____
 - ☐ Are you in an HOA or neighborhood with design rules?
 - ☐ Yes ☐ No
 - If yes, get a copy of the CC&Rs or design guidelines.
 - ☐ Do you have a property survey?
 - ☐ Yes (PDF or CAD file) ☐ No
 - ☐ Is your lot flat or sloped?
 - _____
 - ☐ Do you know the zoning code (R-1, RM, etc.)?
 - ☐ Yes: _____ ☐ No ☐ Not sure
 - ☐ Are there easements or access limitations on the lot?
 - ☐ Yes ☐ No ☐ Not sure
 - ☐ Sewer or septic system?
 - ☐ Sewer ☐ Septic ☐ Not sure
 - ☐ Are utilities available on-site?
 - ☐ All available ☐ Some ☐ None ☐ Not sure
 - ☐ Any testing completed or scheduled?
 - ☐ Soils report ☐ Perc test ☐ Compaction ☐ Asbestos/Lead ☐ None yet
 - ☐ Have you reviewed what's allowed under local zoning?
 - ☐ Yes ☐ No ☐ Will rely on design team
 - ☐ Have you or your team contacted the city or county planning office?
 - ☐ Yes ☐ No ☐ Not sure if needed
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Available Documents

- ☐ Survey (boundary or topo)
- ☐ Title report or preliminary title
- ☐ Previous site plans or construction drawings (if any)

- ☐ HOA or CC&R documents
 - ☐ Photos of the property
 - ☐ Utility maps or notes
 - ☐ Prior permits or city approvals (if applicable)
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Funding & Financing

- ☐ How will the project be funded?
→ ☐ Cash ☐ Construction loan ☐ Home equity loan ☐ Not sure yet
 - ☐ Have you spoken with a lender or started the financing process?
→ ☐ Yes ☐ No
 - ☐ What stage are you in with financing?
→ ☐ Pre-approved ☐ Gathering info ☐ Haven't started yet
 - ☐ Are there funding limits or contingencies that may affect design?
→ ☐ Yes ☐ No ☐ Not sure
→ If yes, explain briefly: _____
 - ☐ Will the lender need cost estimates or budget documentation?
→ ☐ Yes ☐ No ☐ Not sure
 - ☐ Do you have a target total budget (cash + financing)?
→ \$ _____
 - ☐ Will your financing involve progress payments or a draw schedule?
→ ☐ Yes ☐ No ☐ Not sure
 - ☐ Do you need help preparing documents or forms for your lender?
→ ☐ Yes ☐ No ☐ Not sure
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Project Goals & Owner Considerations

- ☐ Estimated total budget: \$ _____
- ☐ Desired start date or construction timeline: _____
- ☐ What is the main purpose of this project?
→ (e.g., family expansion, rental, retirement, resale, work from home)
→ _____

☐ Approximate square footage or general size: _____ sq ft

☐ Bedroom / bathroom target: _____ beds / _____ baths

☐ Will you live in the home during construction?

→ ☐ Yes ☐ No ☐ Maybe

☐ Any accessibility or aging-in-place features to include?

→ ☐ Yes ☐ No

→ If yes, describe: _____

☐ Desired finish level:

→ ☐ Budget-conscious ☐ Mid-range ☐ High-end ☐ Not sure yet

☐ Will you supply your own materials or items? (Check any that apply)

→ ☐ Appliances ☐ Fixtures ☐ AV or lighting ☐ Other: _____

☐ Any known limitations or concerns?

→ (e.g., limited access, trees to protect, tight lot, tricky neighbors)

→ _____