



CLIENT PROJECT INTAKE

Preliminary Estimate Questionnaire

Complete what you can and return it with clear photos or video for a more useful rough estimate range.

PROJECT TYPE / CATEGORY: _____ **DATE:** _____

1. CLIENT + PROJECT

Basic project details and preferred timing.

CLIENT NAME: _____	PHONE: _____
EMAIL: _____	PROJECT ADDRESS: _____
PROJECT AREA / ROOM: _____	APPROX. SIZE / DIMENSIONS: _____
BEST CONTACT: Call Text Email	IDEAL START: ASAP 30 days 1-3 mo. 3-6 mo. Flexible

2. SCOPE + PRIORITIES

What would you like completed, and what matters most?

PLEASE DESCRIBE THE WORK YOU ARE WANTING COMPLETED:

MAIN PRIORITY: Repair damage Improve function Update appearance Add space Accessibility Resale value

ARE WALLS, PLUMBING, ELECTRICAL, DOORS/WINDOWS, OR MAJOR FIXTURES CHANGING? No Yes Not sure

3. WORK AREA + CONDITIONS

These details help us anticipate labor, protection, access, and potential hidden conditions.

PROJECT LOCATION:	Main floor	Basement	Second floor	Attic	Exterior	Detached / other
AREA BELOW / SUPPORT:	On slab	Over finished basement	Over unfinished basement	Over crawl space	Other / not sure	
KNOWN CONDITIONS:	Demo needed	Water/leak damage	Rot/mold concern	Uneven floors/walls	Plumbing changes	Electrical changes
	Structural/framing concern	Tight access / stairs	Limited parking / long carry	Occupied home / pets	None known	

4. MATERIALS + BUDGET

Selections can be finalized later. This only helps build a realistic starting range.

SELECTIONS:	None yet	Some selected	All selected	Need help	MATERIALS:	Client purchased	DNTD source	Mix / TBD			
FINISH LEVEL:	Basic / budget	Mid-grade	Premium	Custom	BUDGET:	Under \$5k	5-15k	15-35k	35-75k	75k+	Unsure
DECISION MAKER(S):	_____				SITE VISIT AVAILABILITY:	Weekday	Evening	Weekend	Flexible		

5. PHOTOS + FINAL NOTES

Please send photos/videos with your completed intake form so we can review the full picture.

PLEASE SEND: Wide/full room Each wall/floor/ceiling Close-ups of issues Measurements / sketch Inspiration / product photos

Access / parking photos if relevant Basement, crawl, or underside photos if relevant

OTHER NOTES (pets, parking, insurance, HOA, schedule, special access, or anything else we should know):

PRELIMINARY ESTIMATE NOTICE: Rough estimates are based on the details, photos, and measurements provided. Final scope, price, schedule, and exclusions require confirmed site conditions, selections, and a written proposal.