

CLIENT INTAKE QUESTIONNAIRE

HYBRID OWNER-BUILDER PROGRAM

This questionnaire helps clarify goals, scope, and expectations before work begins.

Client Information

- Client Name(s): _____
- Project Address: _____
- Primary Residence (Yes/No): _____
- Preferred Contact Method: _____

Project Overview

- Target start date: _____
- Target completion date: _____
- Estimated total build budget: _____
- New build or major renovation: _____

Scope & Design

- Do you have plans? (Yes / In progress / No)
- Architect or designer involved. If yes, name: _____
- Square footage (approx.): _____
- Number of levels: _____
- Special features (garage, basement, outbuildings, etc.): _____

Owner-Builder Experience

- Have you built or remodeled before? (Yes/No)
- Level of hands-on involvement desired (Low / Moderate / High): _____
- Trades you expect to self-manage (if any): _____



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Financial & Risk Considerations

- Construction financing in place? (Yes / No / In progress)
- Cash reserves available for contingencies. (Yes/No)
- Budget flexibility (Fixed / Moderate / Flexible)

Decision-Making & Communication

- Primary decision-maker: _____
- Preferred meeting cadence: _____
- Preferred communication method: _____

Expectations

- What concerns you most about building?

- What does a successful build look like to you?

This questionnaire supports alignment and does not replace formal agreements.