



CLIENT NEEDS ASSESSMENT WORKSHEET

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Project Priorities: Top five, ranked in order of importance from 1 (highest) to 5 (lowest):

1: Most important

2: Second most important

3: Third most important

4: Fourth most important

5: Fifth most important

Budget/Financing, Timing:

Projected Budget Range: \$ _____ - _____

Possible Financing Options

- Have enough cash for project
- Cash-out refinance
- Equity in home large enough
- Home equity loan/2nd mortgage

Check as many that may apply			
Definitely	Potentially	Definitely Not	Not Sure or N/A

Estimated/Preferred start of project: _____

Basic Assessment Items:

Possible Future Plans (over the next 10 yrs)	Check as many that currently apply			
	Definitely	Potentially	Definitely Not	Not Sure or N/A
Planning to start a family				
Planning on expanding family size				
Downsizing resident family size				
Planning to move from the area				

Overall Functional Needs	How accurate are these needs?				
	Very True	Somewhat True	Not Sure or N/A	Probably not	Definitely Not
More gathering/entertaining space needed (ex: family room)					
More private/personal space is needed (ex: additional bedrooms)					
Work-at-home space is needed (ex: separate den or office)					
The basic systems of the home need updating (HVAC, heating/cooling, electrical, plumbing)					
Home appliances and fixtures need to be updated throughout (kitchen appliances, vanity light fixtures, etc.)					
The structural soundness of the home is a question mark (ie-roof integrity, settling, general old age)					

Overall Aesthetics of Existing Home	Check as many that currently apply			
	Not Important	Not Sure/Neutral	Prefer a Change	Needs a Change
Home Exterior Style				
Home Interior Style				
General Curb Appeal				

Room By Room Analysis	Rate the following on scale of 1-5, 1-Poor -- 5-Excellent				
	Basic Size	Functionality	Flooring	Look/Ambiance	Not Applicable
Kitchen					
Breakfast Area					
Master Bedroom					
Bedroom #2					
Bedroom #3					
Bedroom #4					
Formal Living Room					
Formal Dining Room					
Family Room					
Master Bath					
Powder Room					
Hall Bathroom					
Additional Bathroom					
Basement					
Foyer/Receiving Area					
Garage/Carport					
Yard					

Motivation	How accurate are these needs?				
	Very True	Somewhat True	Not Sure or N/A	Probably not	Definitely Not
I want to improve the look of my home on the exterior.					
I want to improve the look of my home on the interior.					
As an investment, I seek to increase the basic market value of my home by increasing the overall available space.					
As an investment, I seek to increase the basic market value of my home by improving the function of the existing space.					
I have toyed with the idea of changing my home for some time now.					
I have done research about the current value of homes in my area.					
I have discussed my possible plans with friends, family or neighbors.					
I want to improve my home just in case I decide to sell it down the road.					
I plan on living in my home for an indefinite period of time.					
Homes in my neighborhood are similar to mine overall in size/scope.					
Homes in my immediate neighborhood are larger or are already improved compared to mine.					
I want to improve my home to equal or assimilate to the current quality of my existing neighborhood.					

Additional Notes/Key Questions:
