

Please complete what you know today. Estimates will be refined as plans, engineering, selections, and site information develop.

01 HOMEOWNER + PROJECT INFORMATION

HOMEOWNER NAME(S)

DATE

EMAIL

PHONE

PROJECT ADDRESS / LOT ADDRESS

CITY

STATE

ZIP

PARCEL / LOT NO.

CURRENT PROPERTY STATUS - CHECK ALL THAT APPLY

☐ Own the lot

☐ Lot under contract

☐ Still looking for land

☐ Existing home / remodel

☐ Plans already started

☐ HOA / design review

02 VISION + DECISION DRIVERS

Tell us what success looks like before we begin pricing square footage.

WHAT IS MOST IMPORTANT TO YOU IN YOUR NEW HOME?

Examples: gathering, views, privacy, low maintenance, entertaining, accessibility

HOW SHOULD THE HOME FEEL AND FUNCTION DAY TO DAY?

Include household routines, children, guests, pets, hobbies, or work from home

PREFERRED ARCHITECTURAL STYLE

TARGET MOVE-IN DATE

TOP THREE PRIORITIES

☐ Stay within budget

☐ Maximize square footage

☐ Premium finishes

☐ Fast schedule

☐ Energy efficiency

☐ Unique design / architecture

03 OVERALL HOME PROGRAM

TARGET CONDITIONED SQ. FT.

STORIES

BEDROOMS

FULL / HALF BATHS

HOUSEHOLD SIZE NOW

HOUSEHOLD SIZE IN 5-10 YEARS

ACCESSIBILITY NEEDS

PRIMARY SUITE LOCATION

☐ Main level

☐ Upper level

☐ No preference

04 ROOMS + USE OF SPACE

Check desired spaces, then note special size or use requirements below.

☐ Dedicated office

☐ Flex room

☐ Formal dining

☐ Breakfast nook

☐ Walk-in pantry

☐ Butler pantry / scullery

☐ Mudroom / drop zone

☐ Main-floor guest suite

☐ Second primary suite

☐ Bonus / game room

☐ Media / theater

☐ Home gym

☐ Craft / hobby room

☐ Laundry near bedrooms

☐ Second laundry

☐ Library / reading room

☐ Pet wash / kennel

☐ Elevator / future elevator

☐ Attached ADU

☐ Detached ADU

☐ Other specialty space

DESCRIBE HOW KEY ROOMS WILL BE USED

Include furniture, equipment, number of users, storage, views, or indoor/outdoor connections

05 KITCHEN + STORAGE

☐ Large entertaining island

☐ Prep sink

☐ 48-in. range / pro appliances

☐ Separate refrigerator / freezer

☐ Beverage or wine station

☐ Walk-in pantry

☐ Back kitchen / scullery

☐ Built-in breakfast seating

☐ Outdoor kitchen connection

☐ Extensive built-ins

☐ Seasonal storage

☐ Safe / secure storage

KITCHEN, APPLIANCE, CABINETRY, AND STORAGE PRIORITIES

06 GARAGE + OUTDOOR LIVING

GARAGE BAYS

- ☐ Attached garage
- ☐ Workshop area
- ☐ Covered patio
- ☐ Pool / spa

OVERSIZED / DEEP BAYS

- ☐ Detached garage
- ☐ Garage storage room
- ☐ Outdoor kitchen
- ☐ Fenced yard

RV / BOAT DIMENSIONS

- ☐ Side-load garage
- ☐ EV charging
- ☐ Fireplace / fire feature
- ☐ Major landscaping

GARAGE, SHOP, PARKING, OUTDOOR LIVING, AND LANDSCAPE DETAILS

07 SITE + CONSTRUCTION FACTORS

If unknown, leave blank; Fortis can help evaluate the property.

- | | | |
|---|--|--|
| ☐ Flat / typical lot | ☐ Sloped / hillside lot | ☐ Limited construction access |
| ☐ Existing structure to remove | ☐ Well / septic | ☐ City water / sewer |
| ☐ Utilities at lot | ☐ Retaining walls likely | ☐ Floodplain / drainage concern |
| ☐ Mature trees to preserve | ☐ Solar orientation important | ☐ Geotechnical report available |

KNOWN SITE CONSTRAINTS, HOA REQUIREMENTS, EASEMENTS, UTILITIES, OR EXISTING IMPROVEMENTS

08 BUDGET + FINISH EXPECTATIONS

Transparent targets help us recommend the right size, structure, and finish level.

TARGET CONSTRUCTION BUDGET

LAND BUDGET / PRICE

FINANCING STATUS

EXPECTED FINISH LEVEL

- | | | |
|---|---|---|
| ☐ Thoughtful / value focused | ☐ Custom mid-range | ☐ High-end custom |
| ☐ Luxury / architectural | ☐ Mix by room | ☐ Need Fortis guidance |

MUST-HAVE FEATURES OR SELECTIONS THAT MAY MATERIALLY AFFECT BUDGET

ANYTHING ELSE WE SHOULD UNDERSTAND BEFORE PREPARING THE PRELIMINARY BUDGET?