



*Prepare for your first consultation by organizing
your design ideas and priorities.*

Initial Plan & Design Consultation Worksheet

This worksheet is designed to help you organize your ideas and prepare for your first consultation with a builder or architect. Its focus is on capturing key preferences and priorities for your home design.

How to Use This Worksheet:

1. Fill out this worksheet before your initial consultation to clarify your ideas.
2. Share it with your builder or architect to ensure alignment on your vision.
3. Update it as your plans evolve or new ideas emerge.

1. General Home Preferences

Outline the basics of your dream home.

- Home Style (e.g., Ranch, Modern, Colonial): _____
- Number of Stories: _____
- Approximate Square Footage Desired: _____
- Preferred Layout (e.g., Open-Concept, Traditional): _____

2. Room-by-Room Priorities

Detail your must-have features and preferences for each major room.

- **Kitchen Features:**

- Preferred Layout (e.g., U-shape, Island): _____
- Must-Have Appliances (e.g., double oven, built-in fridge):

- Countertop Material Preference: _____
- Cabinet Style/Finish: _____

- **Living and Dining Areas:**

- Open to Kitchen? (Yes/No): _____
- Fireplace? (Yes/No): _____
- Built-Ins or Custom Storage? (Yes/No): _____

- **Bedrooms:**

- Number of Bedrooms: _____
- Primary Bedroom Must-Have Features: _____
- Additional Bedroom Features (e.g., en suite, walk-in closets):

- **Bathrooms:**

- Number of Bathrooms: _____
- Shower/Tub Preferences: _____
- Vanity Style and Features: _____

3. Additional Spaces

Include any special-purpose rooms or areas.

- **Garage Size (e.g., 2-car, 3-car):** _____
- **Home Office or Study?** _____
- **Mudroom/Laundry Room Features:** _____
- **Outdoor Living Spaces (e.g., patio, deck):** _____

4. Design and Finishing Style

Share your aesthetic preferences to guide the design process.

- **Exterior Material Preferences (e.g., Vinyl, Brick):** _____
- **Roof Style (e.g., Gable, Flat):** _____
- **Color Palette:** _____
- **Interior Style (e.g., Modern, Rustic):** _____

5. Budget and Timeline

Provide an overview of your constraints and expectations.

- **Estimated Budget Range:** _____
- **Timeline for Completion (Months):** _____
- **Priority Areas to Allocate Budget (e.g., kitchen, flooring):** _____

6. Questions for the Builder or Architect

Prepare questions to ask during your consultation.

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