

B.O.L.D. Homes Lifestyle Analysis

Customer Name _____ Date _____
Spouse Name _____ Home Phone _____
Address _____ Work Phones _____

E-mails _____

Children's Name & Ages _____
Customer's Occupation/Employer _____
Spouse's Occupation/Employer _____

Are you in the market for a new home? _____ Yes _____ No

If yes, what is your preferred occupancy date? _____

Where is your home site preference? _____

Would you like us to contact you? _____ Yes _____ No

How did you hear of BOLD? Referral Real Estate Book Insight Program Agent Newspaper Other

I. Type / Style

(1) (1 1/2) (2) (ML)
____ traditional ____ transitional ____ cape ____ victorian
Special needs _____

II. Size

Approximate finished square feet:
Main level _____
Second level _____
Basement / other _____

III. Location & Utilities

Neighborhood or acreage (size) _____
Topography (flat / walkout) _____
Special features (pool, view, water, trees, shopping, work) _____
Own lot or looking _____
Landscaping _____
(septic / sewer), (water / cistern), (gas / electric)

IV. Budget

Approximate price range of home & lot _____
Source of downpayment _____
Is your current home: sold / on the mkt. / soon to mkt.

V. Foyer

Size _____ Style _____ Ceiling height _____
Stairs _____ turned / straight additional _____
Flooring _____ Other _____

VI. Formal Living Spaces

Dining Room: Approx. size _____ location _____
Ceiling height _____
Furniture considerations _____

Flooring _____ Other _____

Living Room: Approx. size _____ location _____
Ceiling height _____
Furniture considerations _____

Flooring _____ Other _____

VII. Semi-Formal Living Space

Great Room: Approx. size _____ location _____
Ceiling height _____
Furniture considerations _____

Flooring _____ Other _____

VIII. Informal Living Space

Family Room: Approx. size _____ location _____
Ceiling height _____
Furniture considerations _____

Flooring _____ Other _____

Den / Library: Approx. size _____ location _____
Ceiling height _____ Use (work / study) _____

Flooring _____ Other _____

Hearth Room: Approx. size _____ location _____
Ceiling height _____

Flooring _____ Other _____

IX. Bedrooms / Baths

Owners Suite: Approx. size _____ location _____
 Ceiling height _____ sitting area _____
 Flooring _____ Other _____
Owners Bath: Garden tub / whirlpool shower size _____
 # of lav. _____ knee space _____ # WIC _____
 Flooring _____ Other _____
Secondary bedrooms: # _____ size _____
 Location _____
 Flooring _____ Other _____
Secondary Bath # baths _____ # lav. _____
 shower / tub _____ Jack n Jill _____
 Flooring _____ Other _____
Guest bath location front / back _____ ½ / full _____
 Flooring _____ Other _____
Basement RI / Finish ½ / Full _____
 Other bath locations and amenities: _____

X. Kitchen / Breakfast

Eat in / separated / bay _____
 island / snack bar / counter _____
 planning desk / butlers pantry _____
 oak / maple / hickory / cherry / white _____
 raised / recessed _____
 Counter tops formica / corian / other _____
 kitchen sink location _____
 stainless / cast iron / acrylic _____
 Appliances _____
 gas / electric, built in / free standing _____
 range, cook top, oven, microwave, _____
 dishwasher, refrigerator, washer, dryer, _____
 Flooring _____ Other _____

XI. Laundry

Location: main floor / 2nd floor / basement _____
 Laundry tub _____
 Flooring _____ Other _____

XII. Garage

Orientation: Front / Side / Rear _____
 Number of stalls _____ Work or storage space? _____
 # doors _____ door height _____ Opener _____
 Other _____

XIII. Miscellaneous

Fireplace (gas / wood burning) # _____ location _____
 pre fabricated / masonry _____
 hearth (brick / stone / marble / other _____)
 Front / rear porch _____
 Walk out basement _____
 Rear deck / patio _____
 Finished space in basement _____
 Other _____

XIV. Finish

Outside:
 Brick / stone _____
 Siding _____
 Shingles _____
 Exterior doors _____
 special style _____
 Windows _____
 special style _____
 Other _____

Inside:
 Woodwork _____
 Built ins / which rooms _____
 Other _____

Notes:

GRADE	CONTACT DATE	CALL BACK DATE	APPOINTMENT		FOLLOW UP NOTES
			DATE	TIME	