



MARGIE BAUMANN
DESIGN & CONSTRUCTION

Client Profile and Project Information Worksheet

Client Information

Name: _____ Email: _____ Phone: _____

Name: _____ Email: _____ Phone: _____

Property Address: _____

Does anyone else currently live in the home (include ages of children)? _____

Do you have any pets? _____

Project Information

Project Scope, specifically what area(s) of your home would you like addressed? *(can also email photos)*

What activities happen in this space(s)?

Do you have any floorplans or architectural drawings of the existing space?

Project Budget *(if you aren't sure we can circle back to this later, but you should definitely be thinking about how much you want to spend):* _____



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Project Information (cont.)

Desired Completion/Installation Date: _____

Describe any other important factors of your project:

Homeowner Involvement

Do you prefer going to showrooms and making product selections, or would you prefer to have 2-3 options presented to you?

Do you trust someone else to make the best decisions about your space, or do you want to know the what, where and why's of the entire decision making process?

Notes about your level of involvement in the design project:



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Design Objectives

What is your vision for the space? *(this could just be a feeling)*

Personal preferences and Dislikes *(at a later time you can also provide images from magazines, pinterest boards, etc.)*

Are there any social requirements of the space?

What makes a house feel like a home to you?



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Preferences

What are your style preferences? *Can email photos, pinterest boards, provide magazine pages etc. (Formal, informal, elegant, contemporary etc.)*

What are your color preferences? (neutrals, neutrals with pops of color, or lots of color in your space)

What are your pattern preferences? (bold patterns, subtle patterns, floral patterns, plaids etc.)

What are your material preferences? (flooring, counters etc.)

What are your lighting preferences?