



Welcome To Our

SMARTPLAN™

An Easy To Follow Home Planning & Design Process!

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INTRODUCTION

WHAT IS **SMARTPLAN**[™]

Introduction

This document is a planning tool and through this process, we begin to understand what is important to you and your family. It will generate ideas, questions and some good discussion.

You may fill some or all of it out. Our suggestion is that if it becomes 'work' then stop and let us help you. If it isn't fun then we will take a different approach with you. The alternative is that we sit down together and we use a discussion to work through this information.

The more we understand you, your wishes and your goals, the better we can help you.

Our promise to clients – “We will guide you through the planning and decision-making process and take responsibility to ensure that you have a high level of confidence surrounding the choices that you make and your budget, as well as helping you meet the overall objectives regarding the function and aesthetics of your home.”

Date:

Name:

Email:

Telephone:

Mailing Address:

NOTE: All information is optional. The term “home” means home, cottage, etc.

GENERAL OVERVIEW

STEP ONE

General Overview

To start we will ask you to answer a series of questions to help us learn more about your needs and goals:

1. Where do you wish to build? Do you have the property yet?

2. When would you like to be moved into your new home/cottage?

3. Is there an approximate budget or range that you are comfortable with for the entire project, excluding land cost?

4. Where are you at with planning? Do you have any design work done, sketches, etc. at this point? Have you reviewed any design magazines or books?

5. Do you have an idea of the general style of home that you wish to have? Will this be a home, year-round cottage, summer cottage or another use?

6. Do you plan to use timbers or log in your home or are you unsure? Are there other specific finishes or materials that you have in mind?

7. Have you spoken with any builders, designers, architects?

PROPERTY FEATURES & SITE INFORMATION

STEP TWO

Property Features & Site Information

Describe your property - is it on a lake or river or is it country property or in a development; what is the approximate size; are there special views you wish to take advantage of; what is the orientation to the sun?

Topography & Terrain - sloping/flat, natural features, vegetation, soil/rock

Site Servicing (already installed or to be installed)

Water: ☐ Municipal ☐ Well ☐ Lake/River

Septic: ☐ Municipal ☐ Septic

Fuel: ☐ Natural Gas ☐ Solar ☐ Wood ☐ Propane
☐ Oil ☐ Electric ☐ Other

Access: ☐ Public road ☐ Private road ☐ Driveway is in
☐ Driveway needs to be installed ☐ Water access property

GENERAL DESIGN CRITERIA

STEP THREE

General Design Criteria

With reference to the general use of the building that you indicated in Section A (primary home, weekend home, ski chalet, etc.), how many people will live in the home on a regular basis and how many people will you need to accommodate on special occasions or long weekends? Will this change in the future?

Is there a particular style of home that you wish to emulate (Cape Cod, Craftsman, Ranch, Contemporary, etc.)?

Please describe the overall ambience and mood of your home. Use the number scale to indicate preference by circling one of the numbers that apply. Leave blank if unsure. Add notes at will! If this will vary within your home, please note below and in individual room sections.

Formal <<< >>> **Informal**
☐1 ☐2 ☐3 ☐4 ☐5

Elegant <<< >>> **Rustic**
☐1 ☐2 ☐3 ☐4 ☐5

Spacious <<< >>> **Cozy**
☐1 ☐2 ☐3 ☐4 ☐5

Contemporary <<< >>> **Traditional**
☐1 ☐2 ☐3 ☐4 ☐5

Are you planning a full basement, and if yes, do you wish to have a walkout basement?

Are you planning to have a garage, and if yes, do you wish to have an attached garage?

Are you planning to have a porch, and if yes, do you wish to have a screened porch or a regular, covered porch or some other option?

How many years do you anticipate owning your home?

Would you like to design the home to be fully accessible (wheelchair or other) or do you have any other requirement for mobility?

If you have children, what consideration for noise transmission should we consider? For example, should the children have play spaces that are separate from the main living room?

If your site is on water, what shoreline development do you anticipate, such as a dock, boathouse, retaining wall, etc.? Is it important to have a clear view from your kitchen window, or some other room, to the dock so that you can keep an eye on the children / grandchildren?

Have you planned the path to the lake? Do you need stairs? If so, how will they remain unobtrusive?

Are there future buildings such as a garage, sleep cabin, garden shed or studio that we should plan for now?

Are there any specific exterior finishing preferences that you have? The use of cedar and stone are quite common on our homes. Here are some areas to think about:

- Foundation / Basement wall finishes
- House wall finishes
- Roofing type
- Window cladding
- Porch enclosures

ROOM-BY-ROOM DESIGN CRITERIA

STEP FOUR

Room-by-Room Design Criteria

Please take a moment and make notes about each of the rooms that you will have in your home. If you do not plan to have any of the suggested rooms listed, then please cross off or delete it. You may want to use a separate sheet.

1. **ENTRANCE FOYER**

Formal entrance for guests or main entrance? Foyer & mud room combined? Bench, hooks on walls or coat rack? Open to rest of home or closed?

2. **KITCHEN**

Open concept (open to living area)? Eat-in kitchen or will there be separate dining? Island / eating bar? Walk-in pantry? What appliances? Type of cabinets & counter tops? How will layout work for social gatherings?

3. DINING

Formal dining or in kitchen? What size table – how many people? View from dining to rest of home or to outside? How will layout work for social gatherings?

4. LIVING ROOM OR GREAT ROOM

Generally formal or casual? Open onto deck; open to other rooms? What activities – TV, reading, social? Fireplace? What furniture and cabinetry? Finishes such as timbers, wood ceilings?

5. FAMILY ROOM

6. DEN / OFFICE / COMPUTER ROOM OR NOOK/SPACE

7. SUNROOM

8. MEDIA ROOM

9. MASTER BEDROOM

10. MASTER ENSUITE or MAIN BATHROOM

11. OTHER BEDROOMS

12. OTHER BATHROOMS

13. CHILDREN'S PLAYROOM / SPACE

14. HOBBY ROOM

15. LAUNDRY ROOM

16. MUD ROOM

17. UTILITY ROOM

18. LOFTS

19. BASEMENT SPACE

20. STORAGE SPACE (including a pantry, linen closets, broom closets, coat closets, clothes closets, storage for games, cleaning supplies, etc.)

21. SCREENED PORCH

22. COVERED PORCH / VERANDAH

23. SUN DECK / PATIO

24. HOT TUB / POOL

25. EXTERIOR STORAGE

26. GARAGE (number of vehicles, other motorized items such as boats, lawn tractors, ATV's, etc.)

Additional Worksheet

CONCLUSION

NEXT STEPS

Conclusion

Thank you for using our SmartPlan™ document. We hope that it has been helpful in generating a discussion amongst the family about what is important about your new home. Keep in mind that you do not have to fill out any of the document. Our design team will be pleased to sit down with you and guide you through the process.

Once our design team meets with you to discuss your project we will begin designing your home so that you can actually see your ideas take shape on paper. You will be part of the process as your design develops.

Just so you know what is coming up, our staff will take you through our Client Binder next. It is used by our staff to further develop and record your choices for the inside finishing of your home. Our Client Binder includes planning sheets such as:

- Electrical Planning Guide, Plumbing Planning Guide, Fireplace Planning Guide, Interior Finishing Schedule
- Window and Door Checklist, Options Painting, Staining Selections, and Schedule

Schedule A Personal Appointment Today To Get Started!

Email us your completed SMARTPLAN right now by clicking the button below. We will review your plan with you in a personal appointment!



GET STARTED

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