

# B.O.L.D. Company Lifestyle Analysis

Customer Name \_\_\_\_\_ Date \_\_\_\_\_  
Spouse Name \_\_\_\_\_ Phone \_\_\_\_\_  
Address \_\_\_\_\_ Phone \_\_\_\_\_  
\_\_\_\_\_ Text \_\_\_\_\_  
\_\_\_\_\_ 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  Agent  Print  Video  Internet  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 \_\_\_\_\_  
Utilities (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 \_\_\_\_\_  
 stain / painted / glaze \_\_\_\_\_  
 raised / recessed \_\_\_\_\_ soft close \_\_\_\_\_  
 Counter tops formica / Corian / granite / \_\_\_\_\_  
 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 \_\_\_\_\_  
 Rear deck / patio \_\_\_\_\_  
 Walk out basement \_\_\_\_\_  
 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	