Pre-Renovation Planning Worksheet for Investors

Use this worksheet to organize property and project details before making a repair or renovation request.

INFORMATIONAL PREPARATION ONLY. Filling this out or downloading it does not submit a request, request a quote, or schedule work. It does not confirm pricing, availability, timing, scope, or results. Use the separate INEX request form to submit a request.

Project and property details

Prepared by / investor or organization

Property name or internal reference

Property address, city, state, and ZIP

Property type, unit(s), or areas involved

[ ] Repair [ ] Renovation [ ] Other: _____

Desired review timeframe or timing constraints

Project scope

Which rooms, systems, or exterior areas need attention?

Describe the repair or renovation work you would like reviewed.

Known conditions, prior repairs, or safety concerns

Property access and occupancy

These details can help prepare for a separate conversation about the property. Do not include door codes, alarm codes, passwords, or other access credentials here.

Property address or internal reference

[ ] Vacant [ ] Owner-occupied [ ] Tenant-occupied [ ] Partially occupied

Current occupancy details, unit status, or known move-in / move-out dates

Access coordination

Who can coordinate property access? Include name and role.

General entry instructions or where access will be coordinated (no codes)

Preferred access days / hours and any notice requirements

Pets, site hazards, restricted areas, or other site constraints

[ ] Electricity on [ ] Water on [ ] Gas on [ ] Not sure / other: _____

Additional access or occupancy notes

Photos and contact person

If useful, gather current photos separately to help describe the areas you want reviewed. This worksheet does not upload or transmit photos.

Relevant photos

[ ] Overall property view [ ] Room / area overview [ ] Close-up of the issue

[ ] Adjacent area / context [ ] Measurements or reference points, if available

Photo file names and the area or issue shown in each

Contact person

Name and role of the person coordinating this request

Phone number

Email address

Preferred contact method and convenient times

Relationship to the property / authority to coordinate access

Additional notes

Questions or other details to share in a separate request

Completing or keeping this worksheet does not submit a request and does not confirm pricing, availability, timing, scope, or project outcomes.