**Homeowner Information: Date\_\_\_\_\_\_\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_/\_\_\_\_\_\_\_\_\_ Time:\_\_\_\_\_\_\_\_\_\_\_\_**

Homeowner Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Address:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Zip \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Cell \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**General Survey: (During the Pre Call to your Client)**

What are you hoping to accomplish with your new system?

What kind of research have you completed regarding this project so far?

What have you learned?

What has your experience with Contractors in general?

**Environmental Survey: (During the First impression / Goals Section)**

What areas of your home are difficult to heat or cool?

Where do you notice excessive noise from your system?

Does your home seem dry in the winter or humid in the summer?

Does the Cold and Flu season seem Impact your family?

Who in your home has allergies, asthma, hay fever or respiratory issues?

**Summary (Written List of Goals)**

**Establish your Agenda**

It will take me about 30 - 40 minutes to evaluate your system. Then I'll need about 15 minutes to put your report together.

Would there be a countertop I could use to prepare your report?

Once your report is complete, we can review your options until we find a comfortable price for you..

You are welcome to join me during the evaluation or we can break apart for 35 minutes or so.

What would you like to do?