



Client Intake Form For Downsizing / Rightsizing

Contact Information

Name: _____

Email: _____

Phone number you prefer us to use:

(_____) _____

Is this a landline or mobile phone?

May we text to above phone? yes no

How do you prefer to receive communication?

email text phone call

Preferred time of day to contact: _____

Location Where Work Needs to be Done

Street Address: _____

City: _____

State: _____ Zip: _____

Residential Intake

Why are you wanting to downsize? (check all that may apply)

Moving Going into Smaller Living Quarters or Assisted Living Simplifying

Change in Household members Or tell us what you want us to know! What situations or changes have occurred in the home recently? (family/household member changes, recent moves, illness, or other life-changing events?) _____

How many people live in this home now? _____ How many lived there recently? _____

How long have you lived in your home (or how long was it occupied?)? _____ Do you: rent, or own?

Is it a: Single-Family Home Apartment Townhouse Other: _____

Areas that need attention: Kitchen Closets Bedroom Living/Family Room Garage

Basement Attic Outbuilding(s) Off-Site Storage Other: _____

What are your goals? _____

Are Animals in the residence now, or have they been recently? If yes, what kind(s)? _____

What else do you think we should know? _____

Please email form to info@DynamicDuoDownsizing.com or call Kathy at (314) 413-2796 to discuss. Thanks!

General

How do you want us to work with you?

- You're not sure! That's absolutely OK! Let's discuss the possibilities.
- Do it for you, based on your directions/agreement to process
- Do it alongside you, with your active involvement
- Give you ideas to get you going, provide support, inspiration and occasional coaching.

What would be your best time of day to work with us?

Do you have a budget? _____

Do you have a timeframe in mind, or a deadline by which you want to have changes made, or be ready to move? If yes, what is your goal re: timing?

How did you hear about our company?
