



SMP-03 · Sample Qualification Packet · Major Renovation

SAMPLE PACKET. Fictional project, invented details, for illustration of the real form (PKT-01).

Packet ID: GM-2026-014 · **Client:** Tom and Alisa Bergstrom · **Opened:** October 5, 2026

Project: whole-home major renovation, 1962 brick ranch, 1,700 sq ft, Maplecrest Lane, Knoxville, Knox County, Knoxville pod.

Part 1 · Stage 1 Screening Record (first contact)

Field	Entry
Source	Site form, grandmarkinc.com, October 5, 2026
Project type	Renovation (whole-home major rework)
Estimated budget range stated	\$300,000 to \$350,000
Desired timeline or urgency	Work to start January 2027, family out of the house on a 5-month rental lease
Current status	Exploring, no plans yet, living in the house since purchase in February 2026
Primary decision-maker	Tom Bergstrom
Others involved	Spouse (Alisa Bergstrom), construction lender
Prior contractor or builder experience	Small repairs by a local handyman only, no prior major project

Red flag screen: none of the 6 screen items checked. Budget discussed openly in a range on the first call. Scope is major but the clients named it plainly and accepted that discovery items (asbestos survey) price after testing.

Stage 1 result: ADVANCE to questionnaire, October 5, 2026, by Ben Long.

Part 2 · Project Questionnaire (submitted on the Grandmark questionnaire form)

Submitted via grandmarkinc.com/intake.html.

Form field	Answer
Full name	Tom Bergstrom and Alisa Bergstrom
Phone	On file
Email	On file
Property address, including county	Knox County, Tennessee (street address on file)

What is your total budget or project size? Range is fine.	\$340,000 total, stated as a firm ceiling
What is your ideal completion date?	Mid-May 2027, house livable again before the rental lease ends May 31, 2027
Tell us about your project.	Whole-home renovation of our 1962 brick ranch, 1,700 sq ft: all systems replaced (electrical, plumbing, HVAC), kitchen and living opened up, full interior rework.
Do you have plans, drawings, or a scope document?	No plans. Room-by-room scope list written by the clients, 2 pages, received October 7, 2026
Who will make final decisions on this project? (First and Last Name of each.)	Tom Bergstrom and Alisa Bergstrom, jointly on scope and money; Tom is the day-to-day lead
Are other stakeholders involved (partner, spouse, lender, investor)? If so, please list them below.	Construction lender (pre-approval in process at screening, letter received later), no investor
How do you prefer to receive updates?	Email for documents, text for schedule items
What are your top 3 priorities?	1. All systems replaced once and done right (electrical, plumbing, HVAC). 2. Open kitchen and living layout. 3. Back in the house before the rental lease ends
Any payment structure preferences or constraints?	Construction loan draws, no objection to the published Grandmark fee structure
Land status	Owned
Financing path	Construction loan
Other: Anything else we should know?	Third child due July 2027; the renovation is to finish before the birth

Part 3 • Stage 3 Walkthrough / Discovery Record

Held on site October 10, 2026, with Tom Bergstrom and Ben Long. Alisa Bergstrom works out of state and did not attend (see Part 5, item 1). Confirmations:

- ☒ Budget is real and discussed openly in a range: Yes, \$340,000 ceiling stated twice, loan pre-approval already in hand at walkthrough
- ☒ Scope is clear enough to move forward, or the path to clear scope is agreed: Yes, room-by-room list walked and measured; demolition pricing stays conditional until the asbestos survey clears (Part 5, item 2)
- ☒ Communication style and expectations aligned: Yes, email for documents, text for schedule, weekly written update expected during construction
- ☐ Decision-maker present and engaged: Partial. Tom present and engaged. Alisa is a joint decision-maker and has not yet confirmed scope and budget on a call. Confirmation call scheduled, see Part 5, item 1



- ☒ Project is feasible for the partner network: Yes, major renovation profile, Knox County, full systems plus structural wall removal, fits the large-scale residential partner profile
- ☒ Overall read: clean, professional engagement expected: Yes

Site facts captured at walkthrough:

Item	Finding
Parcel size, slope, buildable area	0.31 acre, flat, single-story ranch, no addition in scope, all work inside the existing footprint and systems
Access and driveway	Paved driveway, street parking for trades, dumpster placement on driveway confirmed with the client
Water	Public, city tap active, galvanized supply lines original to 1962, full repipe in scope
Sewer	Public, city sewer, cast iron drain lines original, camera inspection recommended before bath rework pricing is firm
Septic evaluation or perc	Not applicable, public sewer
Power and gas	100 amp panel, original, upgrade to 200 amp in scope. Gas service active, furnace and water heater gas
Survey	On file, dated February 2026 (purchase survey)
Zoning, HOA, setbacks, easements	Residential zoning, no HOA, no setback impact, no additions or footprint change
Photos taken	46 photos, all rooms, panel, attic access, crawlspace entries, filed against the client record in GRID

Part 4 • Budget and Financing Verification

Line	Amount
Total project budget	\$340,000
Land cost committed or allowed	\$0 (house owned, purchased February 2026)
Construction budget inside the total	\$298,000
Site work allowance (dumpster, temporary services, storage)	\$7,000
Contingency held by client	\$35,000

- Cost check: construction budget \$298,000 against the whole-home rework range of \$125 to \$250 per sq ft (Grandmark cost guide, October 2026 edition). At 1,700 sq ft the range is \$212,500 to \$425,000. The construction budget sits INSIDE RANGE.

- Cut order if bids land high (client's own words): 1. Hold the 2nd bath at a mid-level finish instead of the upper finish priced. 2. Delay the primary bath heated floor. 3. Reduce kitchen cabinet spec from semi-custom to stock with custom fronts
- Financing path: Construction loan
- Lender and loan officer: Construction lender, details held in the client file. Pre-approval: Letter on file, dated October 2, 2026
- Proof of funds if cash: Not applicable, loan financed. Client contingency of \$35,000 confirmed verbally and consistent with the loan structure
- Lender conditions affecting builder or schedule: Draw schedule with lender inspections at each draw. Asbestos survey report required by the lender before the 1st draw if demolition touches suspect materials

Part 5 · Red Flags and Open Items

#	Flag or open item	Owner	Due	Status
1	Alisa Bergstrom is a joint decision-maker and missed the October 10 walkthrough (works out of state). Decision-maker confirmation call on scope, budget ceiling, and cut order still owed before the match is final	Client (Tom to schedule, Ben to run the call)	October 21, 2026	Open
2	Asbestos survey on 1962 materials (floor tile and mastic, pipe insulation, ceiling texture) not yet done. Demolition scope cannot be priced firm until results are back. Survey ordered by Grandmark, site visit October 20, 2026, results expected October 23, 2026	Grandmark to order and chase, cost borne by client outside the construction budget	October 23, 2026	Open, ordered

No other flags. Budget inside range, financing documented, land and title not in question (owned, purchased February 2026), timeline feasible for phased work starting January 2027.

Readiness call: READY WITH CONDITIONS (items 1 and 2 above)

Qualification summary: Whole-home rework of a 1962 ranch with every system at end of life, a firm \$340,000 ceiling that checks inside the cost range, and loan pre-approval already documented. 2 conditions ride with the packet: a joint decision-maker still owes a confirmation call, and demolition pricing stays conditional until the asbestos survey reports on October 23, 2026.

Part 6 · Gate Stamps

- ☒ Client Qualification Agreement signed · date: October 12, 2026
- ☒ Client Tranche 1 paid · \$1,475 · date: October 12, 2026 (flat fee band: \$2,950, project total under \$350,000. Tranche 2 of \$1,475 due at builder contract signing, \$0 if no contract signs)



- ☒ Tri-Party Disclosure signed by client, builder, Grandmark · date: October 14, 2026
- ☒ Partner-Ready Brief released to: Partner builder, major renovation profile, Knox County · date: October 14, 2026

Deliverable A · Client Qualification Packet (cover summary, as sent to the clients)

Readiness call: READY WITH CONDITIONS. Your budget of \$340,000 checks against current East Tennessee costs for a whole-home rework of this size, and your loan pre-approval is on file, so the project is real and priced honestly. 2 conditions ride with it: Alisa's confirmation call (scheduled by October 21, 2026) and the asbestos survey (results expected October 23, 2026), which decides whether demolition prices firm or carries an allowance.

Your next steps, in order: 1. Confirmation call with Alisa, week of October 19, 2026. 2. Asbestos survey visit October 20, 2026, access arranged by Tom. 3. Builder walkthrough of the house with the matched partner, late October 2026. 4. Firm pricing after survey results, target November 13, 2026. 5. Contract signing target late November 2026, work starts January 4, 2027, the week the rental lease begins.

Fee status: qualification fee band \$2,950. Tranche 1 of \$1,475 paid October 12, 2026. Tranche 2 of \$1,475 is due at builder contract signing, and is \$0 if no contract signs.

This packet belongs to you and can be used with any builder.

Deliverable B · Partner-Ready Project Brief (as sent to the matched builder)

READINESS CALL: READY WITH CONDITIONS (2 items, listed below)

Project: Whole-home major renovation, 1962 brick ranch, 1,700 sq ft, single story, Maplecrest Lane, Knoxville, Knox County. Clients bought the house in February 2026 and live in it now. Family moves to a rental for 5 months starting January 2027 and the build runs empty.

Scope summary: Full systems replacement: 100 amp to 200 amp panel upgrade and rewire as required, full plumbing repipe (galvanized supply and cast iron drains), new HVAC system and ductwork. Kitchen gut to the studs with a load-bearing wall removal between kitchen and living (engineered beam), full kitchen build-out at an upper-mid finish. 2 bathroom reworks, primary bath to an upper finish, hall bath to a mid finish. Layout changes across about 1,700 sq ft: kitchen and living opened, primary suite reconfigured inside the existing footprint, laundry moved from basement to the main level. No addition, no footprint change.

Site facts: 0.31 acre flat lot, paved driveway with dumpster placement agreed, public water and public sewer, gas service active. Purchase survey on file (February 2026). No HOA, no setback or zoning impact. 46 walkthrough photos available with this brief.

Budget and cost check: Total project budget \$340,000, construction budget \$298,000, contingency of \$35,000 held by the clients outside the construction budget. Grandmark cost check: whole-home rework range \$125 to \$250 per sq ft puts this house at \$212,500 to \$425,000. The construction budget is inside range. Client cut order if bids land high is documented and available at pricing.



Financing evidence status: Construction loan. Pre-approval letter on file, dated October 2, 2026. Lender draws run on lender inspections. The lender requires the asbestos survey report before the 1st draw if demolition touches suspect materials.

Decision makers and contact: Tom Bergstrom is the lead decision-maker and day-to-day contact (email for documents, text for schedule). Alisa Bergstrom is a joint decision-maker on scope and money. See condition 1.

Timeline and deadlines: Pricing through November 2026, contract target late November 2026. Family moves out the week of January 1, 2027, work starts January 4, 2027. Hard deadline: house livable by May 29, 2027, the rental lease ends May 31, 2027 and a baby is due July 2027. Phased work in an empty house, no occupied-home constraints during construction.

Red flags and open items (the 2 conditions):

1. Joint decision-maker confirmation outstanding. Alisa Bergstrom works out of state and missed the walkthrough. A confirmation call on scope, the \$340,000 ceiling, and the cut order is scheduled by October 21, 2026. Treat scope and budget as confirmed by Tom, with joint confirmation landing within 1 week of this brief.
2. Asbestos survey pending. 1962 materials in the demolition path (floor tile and mastic, pipe insulation, ceiling texture) are untested. Survey visit is October 20, 2026, results expected October 23, 2026. Price demolition as an allowance until results land, then firm. If abatement is required, it prices as a separate line before contract.

Documents available on request: Loan pre-approval letter (on file), purchase survey (on file), client room-by-room scope list (on file), 46 walkthrough photos (on file), measured drawings by the clients' designer (pending, expected November 2026), asbestos survey report (pending, expected October 23, 2026).

Response required: Within 3 business days of October 14, 2026, so by October 19, 2026: accept, pass, or name the specific missing information you need.

Grandmark fee line for this deal (restated from the signed Tri-Party Disclosure): \$8,460, calculated at 3% on the first \$250,000 of the \$298,000 contract value (\$7,500) plus 2% on the remaining \$48,000 (\$960). Paid 50% at contract signing (\$4,230) and 50% at construction start or first draw (\$4,230). No buyer agent commission is payable on this project, so no co-op adjustment applies.

Prepared by: Grandmark qualification team, October 14, 2026 · Approved by Ben Long: BL, October 14, 2026 · Filed against the client record in GRID on October 14, 2026