



CONTACT INFORMATION

Full name

Company / Organization

Role / Title

Email

Phone

Best time to reach you

Mailing address

City

State

ZIP

Preferred contact method

☐ Email

☐ Phone

☐ Text message

ABOUT YOU

Which best describes your role? (select all that apply)

☐ HOA board member / community association

☐ Homeowner

☐ Owner / owner representative

☐ General contractor

☐ Architect / designer

☐ Realtor / broker

☐ Business owner / executive

☐ Operations / management

Other (please describe)

CURRENT STATE & OTHER PARTIES

Is an attorney currently engaged on this matter?

☐ Yes

☐ No

If yes, attorney / firm name

Are there any active disputes, claims, or litigation?

☐ Yes

☐ No

Are there other parties or stakeholders involved?

☐ Yes

☐ No

If yes, who? (owners, boards, contractors, agencies, etc.)

Any scheduled hearings, meetings, or deadlines we should note

PROJECT / MATTER

Project / matter name

Property address (if applicable)

Project type (select all that apply)

☐ New construction

☐ Planning / pre-design

☐ Inspection / audit

☐ Technology implementation

Approx. project / engagement value

☐ Renovation / remodel

☐ Dispute / claim

☐ Business systems / process development

☐ Other

Square footage (if known)

Industry (if business engagement)

Company size / headcount (if applicable)

Current systems / tools in use (if applicable)

Brief description of the project or matter

YOUR REQUEST

What do you need help with? (select all that apply)

☐ Document / contract review

☐ Compliance / permit navigation

☐ Due diligence

☐ Process & SOP development

☐ Attorney facilitation / referral

Anything else we should know about your request

☐ Project documentation

☐ Stakeholder coordination

☐ Pre-legal dispute navigation

☐ Systems / technology implementation

☐ Not sure — need guidance

TIMELINE

Desired start date

Key deadline (if any)

Urgency

☐ Immediate

☐ Within 1–4 weeks

☐ 1–3 months

☐ Just exploring

DOCUMENTS AVAILABLE

Which do you currently have? (select all that apply)

- | | |
|---|---|
| ☐ Contracts / agreements | ☐ Plans / drawings |
| ☐ Permits / approvals | ☐ Correspondence / emails |
| ☐ Photos | ☐ Budgets / financials |
| ☐ Inspection reports | ☐ SOPs / process documents |
| ☐ Software / vendor agreements | ☐ Org chart / policies |
| ☐ Other | |

ENGAGEMENT & SOURCE

What kind of engagement are you considering?

- | | |
|--|---|
| ☐ One-time consultation | ☐ Project-based engagement |
| ☐ Ongoing / retainer | ☐ Not sure yet |

How did you hear about Plinth Advisory LLC?

ACKNOWLEDGMENT

- ☐ I understand that Plinth Advisory LLC provides advisory, documentation, and coordination services, and does not provide legal advice or legal representation.

Signature

Date