

ENGAGEMENT QUESTIONS · INITIAL FAQ

Questions for the Development Team

To scope the engagement accurately and arrive at discovery ready to work, we would appreciate answers to the questions below. Short answers, documents or "to be decided" are all helpful. Where an answer is confidential, we are glad to discuss it in the meeting instead.

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TOPICS

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QUESTIONS

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MINUTE DISCOVERY
MEETING

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ACCOUNTABLE PARTNER

01 Project & Product

- 01 What is the legal name of the development entity and ownership group, and who signs the engagement?
- 02 What is the exact site location and total acreage, and how does the community connect to its key amenities (beach, water, golf or town), by ownership, easement or public access?
- 03 What is the confirmed unit mix by phase: unit types, square footage, bedrooms/baths, lot sizes and rooftop or pool options?
- 04 Which amenities are committed, and in which phase will each be delivered (pool, spa, fitness, courts, clubhouse, EV charging)?
- 05 Who are the architect, interior designer, general contractor and landscape architect, and may we name them in marketing?
- 06 What finish standards and option packages are included in the base price versus offered as upgrades?
- 07 What resilience features are designed in (hurricane rating, roofing, windows, generator or solar, water storage)?

02 Pricing & Inventory Release

- 08 What is the current price list for the first release, and how will later-phase pricing be set and announced?
- 09 How many first-release units are available today, and are any reserved, under contract or held back?
- 10 What is the planned release cadence for inventory, and will units be released in tranches with scheduled price increases?
- 11 Are founding-buyer, broker or early-reservation incentives available, and what are their limits?
- 12 What deposit structure applies (reservation, contract, construction draws), and how are deposits held and refunded?
- 13 Is there a minimum price below which the developer will not negotiate, and who approves price exceptions?

03 Timeline & Construction

- 14 What is the current construction schedule by phase, and which permits are issued versus pending?
- 15 What are the target dates for groundbreaking, model or show unit availability, and first deliveries?
- 16 Is there a sales center, model home or on-site space we can use for previews and buyer visits, and from when?
- 17 How will construction progress be documented (drone, photography, reports) and shared with buyers?
- 18 What contingencies exist if a phase is delayed, and how should delays be communicated to reservation holders?

04 Ownership, HOA & Use Rules

- 19 How is title structured (fee simple, condominium regime, or other), and who is the title and closing provider?
- 20 What is the projected HOA budget and monthly fee by unit type, and what does it cover?
- 21 What are the rules for short-term and long-term rentals, guests, pets and exterior changes?
- 22 Will the developer or a third party offer property management, concierge or home-watch services? (Rental programs need counsel review before they are marketed.)
- 23 What flood zone and insurance information can be disclosed for each lot, and is there a recommended insurance agent?

05 Sales Team & Brokers

- 24 Who is the licensed broker of record, and what is their license number and role in the sales process?
- 25 Is there an existing in-house sales team, and who will conduct appointments, tours and contract negotiations?
- 26 What co-broker commission and registration rules apply, and how are broker leads protected?
- 27 Which brokerages or agents have already shown interest or brought buyers?
- 28 Who on the developer side approves reservations and contracts, and what is the expected turnaround?

06 Buyers & Existing Demand

- 29 How many inquiries, reservations or contracts exist today, and from which sources and markets?
- 30 Can we review the existing lead list and CRM history, and do those contacts have documented consent to be contacted?
- 31 Who do you believe the most likely buyers are, and what feedback have you heard on price, product or location?
- 32 Which objections come up most often, and how have they been answered?
- 33 Are there buyer groups, networks or partners (family offices, relocation advisors, lenders) you already work with?
- 34 Are there lender partners or financing programs available to buyers, including for second-home purchases?

07 Brand, Assets & Claims

- 35 What brand assets exist today (logo, guidelines, renderings, video, drone footage, photography, floor plans), and who owns the rights?
- 36 Is the project name final and protected, and which domains and social accounts does the developer own?
- 37 Which statements in the current sales materials have been reviewed by counsel, and what sources support the market statistics?
- 38 If tax incentives are mentioned in marketing, has tax counsel approved the wording and confirmed current rules and deadlines?
- 39 Are there any restrictions on referencing nearby landmarks, resorts or comparable communities in marketing?

08 Budget & Commercial Terms

- 40 What is the year-one budget range for advertising, events and buyer visits, separate from our fees?
- 41 Which media and events tier fits year one, and when should the Success Package start?
- 42 Which success-fee basis do you prefer (fixed per attributable closing, a negotiated percentage, or milestone fees), subject to local counsel review?
- 43 How should attribution work: the window, the treatment of existing leads and broker-sourced buyers, and the payment trigger?
- 44 What term, exclusivity, termination and transition provisions do you expect?
- 45 Who approves invoices, media spend and creative, and what is the approval turnaround?

09 Systems, Data & Accounts

- 46 Which systems are in place today (CRM, website, email, phone, ad accounts, analytics), and who administers them?
- 47 Will the developer own all new accounts and data, with our team working under delegated access?
- 48 Are there data, privacy or security requirements from the developer, lender or investors that we must follow?
- 49 Who should receive live dashboard access and the weekly and monthly reports?

10 Legal & Compliance

- 50 Who is the developer's local real estate counsel, and are they available to review our scope and fee structure?
- 51 What is the developer's licensing and registration status with the local housing or consumer authority, and which advertising disclosures must appear in every ad?
- 52 Has counsel reviewed ILSA registration or exemption (for U.S. projects) and any local registration rules for a multi-phase community?
- 53 Which disclosures, disclaimers and contract documents must buyers receive, and at what stage?
- 54 Are there any pending permits, disputes or community concerns we should know before launching publicity?

11 Goals & Decision-Making

- 55 What does success look like at 90 days, 6 months and 12 months, and which outcomes matter most?
- 56 Who are the decision-makers for this engagement, and what is the timeline to decide?
- 57 What has worked or not worked in marketing the project so far?
- 58 Are there partners, vendors or agencies already engaged whose work we should coordinate with or transition?
- 59 When can we schedule the 90-minute discovery meeting and a hosted site visit?

HOW TO SEND ANSWERS

Reply by email with answers and any documents (price list, site plan, floor plans, renderings, HOA budget, construction schedule, current sales-material sources, existing lead list), or bring them to the discovery meeting. Contact: Krystalore Crews, MBA · krystalore@thecrewscoach.com · WhatsApp +1 716-390-6727.

These questions support scoping a marketing, sales-operations and technology engagement. They are not legal, tax or investment advice. Regulated brokerage activities remain with licensed professionals.