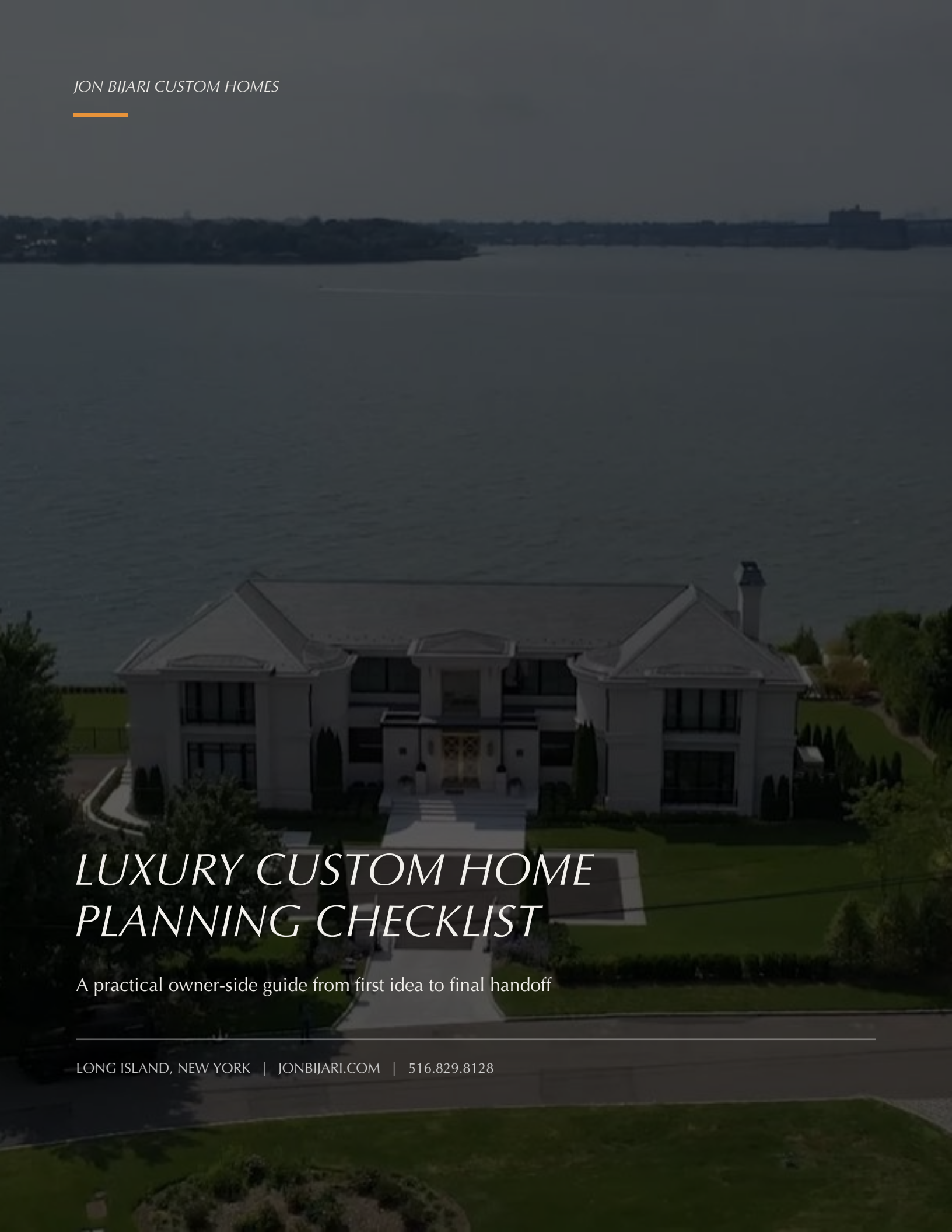


JON BIJARI CUSTOM HOMES



LUXURY CUSTOM HOME PLANNING CHECKLIST

A practical owner-side guide from first idea to final handoff

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SECTION 01

DEFINE THE HOME BEFORE DESIGNING IT

A clear owner brief gives every professional the same target. Record what must be true about the finished home before drawings, budgets, and schedules begin to harden.

- ☐ Write the three most important outcomes for the completed home.
- ☐ Separate non-negotiable needs from preferences and future possibilities.
- ☐ Describe daily routines, entertaining, guests, work, wellness, storage, pets, and staff needs.
- ☐ Identify accessibility, aging-in-place, privacy, security, sustainability, and resilience goals.
- ☐ Define the desired relationship between interiors, terraces, pool, landscape, and views.
- ☐ Discuss the level of technology, automation, audiovisual, lighting control, and backup power expected.
- ☐ Agree who has owner decision authority and how family decisions will be resolved.
- ☐ Set a target move-in window and identify any date that is truly immovable.

The goal is not to design the house yourself. It is to give the design and construction team a precise understanding of how the house needs to perform.

OWNER NOTES

SECTION 02

BUILD THE RIGHT TEAM AND DEFINE THE ROLES

Luxury projects succeed when every discipline is strong and the boundaries between them are clear. Select for relevant experience, communication, judgment, and fit - not presentation alone.

- ☐ Confirm which professionals are required: architect, interior designer, landscape architect, engineers, lighting, audiovisual, security, pool, civil, and other specialists.
- ☐ Ask each candidate to explain comparable projects and the difficult decisions behind them.
- ☐ Understand who will personally lead the work and who will be present day to day.
- ☐ Check references about the middle and end of projects, including changes, problems, punch list, and warranty follow-through.
- ☐ Define who prepares, reviews, approves, and communicates each category of decision.
- ☐ Decide whether an independent owner's representative would improve owner-side coordination, reporting, and accountability.
- ☐ Require written scopes that identify services, exclusions, deliverables, meeting cadence, and site involvement.
- ☐ Create one shared directory for current contacts, contracts, responsibilities, and emergency information.

The owner's representative complements the architect, builder, designers, consultants, inspectors, attorney, and other licensed professionals. The exact role and authority should be written into the engagement.

TEAM CANDIDATES AND QUESTIONS

SECTION 03

UNDERSTAND THE PROPERTY AND COORDINATE THE DESIGN

The property sets the boundaries of the opportunity. Reliable surveys, investigations, approvals, and coordinated documents reduce surprises after the work becomes expensive to change.

- ☐ Obtain current boundary, topographic, and utility information appropriate to the project.
- ☐ Review zoning, setbacks, height, lot coverage, easements, access, and the likely approval path.
- ☐ Investigate drainage, soil, groundwater, existing structures, trees, environmental constraints, and utility capacity as applicable.
- ☐ Map exterior work including driveways, terraces, pool, retaining walls, drainage, landscape, lighting, and accessory structures.
- ☐ Establish design milestones and what must be resolved at each one.
- ☐ Coordinate architecture, structure, mechanical, electrical, plumbing, lighting, interiors, millwork, landscape, and technology.
- ☐ Use milestone estimates to test whether the design and expected finish level remain aligned with the owner budget.
- ☐ Resolve difficult interfaces and repeated details with drawings, samples, or mockups before full installation.

PROPERTY, APPROVAL, AND DESIGN RISKS



SECTION 04

CREATE THE COMPLETE OWNER BUDGET

The construction contract is only one part of the owner's financial exposure. Track the entire project in one place and distinguish firm numbers from assumptions.

- ☐ Include design fees, consultants, investigations, approvals, insurance, financing, construction, owner purchases, furniture, art installation, moving, and other soft costs.
- ☐ Separate fixed scope, estimates, allowances, alternates, exclusions, contingencies, and owner-supplied items.
- ☐ Confirm what each allowance includes: material, labor, tax, delivery, waste, protection, and related work.
- ☐ Compare builder proposals line by line rather than comparing only total prices.
- ☐ Carry contingency appropriate to design completeness, site uncertainty, and expected owner changes.
- ☐ Maintain current logs for commitments, approved changes, pending changes, forecast cost, paid-to-date, and remaining exposure.
- ☐ Require change proposals to show scope, credits, backup, markups, decision deadline, and schedule effect.
- ☐ Have legal, insurance, tax, and contract questions reviewed by the appropriate licensed professionals.

OWNER BUDGET CATEGORY	CURRENT TARGET	OPEN EXPOSURE
Design and consultants	\$	\$
Approvals and soft costs	\$	\$
Construction contract	\$	\$
Owner purchases and furnishings	\$	\$
Contingency	\$	\$

SECTION 05

PROTECT THE SCHEDULE WITH DECISIONS AND PROCUREMENT

A credible schedule connects construction milestones to information, approvals, fabrication, delivery, and owner decisions. The completion date alone is not enough.

- ☐ Create one integrated milestone schedule for design, approvals, procurement, construction, commissioning, and closeout.
- ☐ Identify the critical path and the assumptions behind the target completion date.
- ☐ Maintain an owner decision log showing the information needed, decision maker, due date, cost effect, and schedule effect.
- ☐ Create a selection and procurement schedule for windows, appliances, stone, millwork, lighting, hardware, equipment, technology, and specialty finishes.
- ☐ Confirm approvals and field measurements before long-lead fabrication begins.
- ☐ Track submittals, samples, mockups, deposits, production, shipping, storage, delivery, and installation readiness.
- ☐ Review schedule changes with a written explanation of cause, recovery options, and owner decisions required.
- ☐ Plan temporary protection, conditioned storage, and responsibility for owner-purchased items.

A fast decision is useful only when the owner has complete information early enough to make it intelligently.

LONG-LEAD ITEMS AND DECISION DEADLINES



SECTION 06

CONTROL QUALITY DURING CONSTRUCTION

Quality cannot be inspected into a home at the end. Establish the standard, review the first installation, and document work before it is covered.

- ☐ Confirm the project reporting rhythm for meetings, site observations, photographs, open items, risks, schedule, budget, and owner approvals.
- ☐ Require current drawings, specifications, selections, submittals, and field directives at the point of work.
- ☐ Identify quality-control checkpoints before waterproofing, structure, rough-ins, insulation, and other concealed work are covered.
- ☐ Use samples and mockups for important exterior assemblies, stone, tile, millwork, lighting alignment, plaster, paint, and repeated details.
- ☐ Review the first completed installation before the condition is repeated throughout the house.
- ☐ Track requests for information, submittals, substitutions, nonconforming work, and unresolved design questions.
- ☐ Evaluate payment applications against completed work, stored materials, approved changes, and contract requirements.
- ☐ Record owner-requested changes separately from corrections required to meet the agreed documents and standard.

QUALITY CHECKPOINTS AND MOCKUPS

SECTION 07

PLAN MOVE-IN, CLOSEOUT, AND THE WARRANTY PERIOD

A finished-looking home is not necessarily complete. The last phase must deliver tested systems, final records, training, completed work, and a usable path for warranty response.

- ☐ Begin the closeout requirements list before finish trades and vendors leave the project.
- ☐ Separate contractual punch-list items from new owner preferences or added scope.
- ☐ Assign every outstanding item a location, description, responsible party, due date, status, and verification method.
- ☐ Test and commission mechanical, electrical, plumbing, lighting, controls, audiovisual, security, generator, irrigation, pool, and other integrated systems as applicable.
- ☐ Collect approvals, warranties, manuals, finish schedules, care instructions, record information, keys, credentials, specialty tools, and spare materials.
- ☐ Train the homeowner and property staff on normal operation, seasonal changes, maintenance, emergency shutoffs, alarms, and service contacts.
- ☐ Reconcile the contract, approved changes, payments, remaining work, and applicable retainage or releases.
- ☐ Establish how warranty requests will be submitted, prioritized, scheduled, completed, and verified after move-in.

Use this checklist as a planning conversation, not as architectural, engineering, legal, insurance, tax, or code advice. Your project's contracts and licensed professionals define the controlling requirements and responsibilities.

CLOSEOUT ITEMS AND WARRANTY CONTACTS

PUT 26 YEARS OF BUILDING EXPERIENCE ON
YOUR SIDE

Jon Bijari Custom Homes builds one-of-a-kind luxury residences across Long Island, from Great Neck to the Hamptons. Jon also serves as an owner's representative for clients who want an experienced builder protecting their priorities through design, construction, and final handoff.

<i>BUILD A CUSTOM HOME</i>	<i>OWNER'S REPRESENTATION</i>
A hands-on building relationship centered on architecture, workmanship, budget, and the way the home will be lived in.	Independent owner-side guidance for team selection, design coordination, budget, schedule, construction, and closeout.

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