

DON'T START THAT REMODEL YET

Printable Companion Workbook

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Use this workbook alongside the full guide. The worksheets help you plan, compare, document, and verify. The book explains the reasoning, warning signs, and decision rules behind the tools.

Decision rule: PROCEED / INVESTIGATE / STOP

Full guide: <https://www.amazon.com/dp/B0HM11WYQ1>

Permanent workbook page: <https://jtwgco.com/remodel>

APPENDIX A — THE EIGHT COMPANION TOOLS

are prompts and checklists, not legal forms.

Tool 1 — Project Planning & Budget

What problem must this project solve?

Must-haves:

Nice-to-haves:

Work definitely included:

Work definitely excluded:

Major selections still open:

Construction budget:

Design/engineering/permit budget:

Owner-purchased items:

Temporary living/storage/other project costs:

Contingency reserve:

Maximum responsible spend:

PROCEED / INVESTIGATE / STOP — Why?

Tool 2 — Contractor Evaluation

Legal business name and contract entity:

Required license/registration authority and status:

Insurance documents received and verified as appropriate:

Projects similar to mine:

Recent references contacted:

Who will actually manage the job?

How many other jobs does that person manage?

Regular subcontractors / trade relationships:

How changes are authorized:

How payments are triggered:

What usually makes a project like mine late or more expensive?

What concerns the contractor most about my project?

Red flags requiring follow-up:

PROCEED / INVESTIGATE / STOP — Why?

Tool 3 — Bid Comparison

Contractor A / B / C total:

Scope differences:

Important exclusions:

Cabinet allowance:

Tile/flooring allowance:

Plumbing/lighting allowance:

Permit/design/engineering treatment:

Painting/cleanup treatment:

Pricing model:

Owner-paid costs not in proposal:

Normalized expected total:

Why is the low bid lower?

Why is the high bid higher?

Best overall value and why:

Tool 4 — Contract Review

Scope and exclusions are understandable:

Plans/specifications incorporated:

Pricing model and allowances defined:

Deposit and payment triggers defined:

Stored materials treatment defined:

Schedule milestones and owner decision dates:

Change-order authorization and pricing:

Hidden-condition procedure:

Permit/inspection responsibilities:

Insurance obligations:

Cancellation notice/right if applicable:

Notice and cure process:

Dispute process:

Termination provisions:

Punch-list/final completion definition:

Lien/closeout/final-payment conditions:

Questions for attorney or other professional:

Tool 5 — Project Control Log

Current milestone / planned date / actual date:

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Owner decisions due before next milestone:

Open change orders and pending prices:

Current contract total:

Current projected completion:

Important decision made this week:

Who confirmed it and where is it documented?

What does the contractor need from me before next check-in?

What do I need from the contractor before next check-in?

Tool 6 — Payment & Lien Protection

Payment request number/date/amount:

Contract milestone or billing basis:

Work supporting request verified:

Prior payments reconciled:

Approved changes and credits reconciled:

Stored-material documentation if applicable:

Required inspection/certification documents:

Preliminary notices/payment-chain parties tracked:

Required progress/final lien documents received:

Lender draw requirements satisfied if applicable:

Remaining contract balance after payment:

PROCEED / INVESTIGATE / STOP — Why?

Tool 7 — Inspection, Problem & Escalation

Date and location of issue:

What I observed — facts only:

Photographs/documents preserved:

Which contract/plan/manufacture/trade/code requirement may apply?

Is work about to be concealed or destroyed?

Contractor explanation:

Proposed correction:

Independent expert needed?

Formal notice/cure required?

Dispute ladder stage: Document / Discuss / Notice / Expert or

Neutral / Binding Resolution

If work has stopped: last meaningful work, last communication, schedule status, payment status, permit status, property protection, replacement/termination legal review.

Tool 8 — Final Walkthrough & Closeout

Punch-list items documented room by room:

Functional checks completed:

Final price reconciled:

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Approved changes and credits reconciled:

Required final inspections complete:

Permit appropriately closed where required:

Final lien documentation complete where applicable:

Workmanship warranty received:

Manufacturer warranties/product information received:

Manuals/model/serial information received:

Keys/remotes/codes handed over:

Paint/tile/flooring/spare materials recorded:

Final drawings/redlines where applicable:

Project archive backed up:

PROCEED / INVESTIGATE / STOP before final payment:

One-Page Decision Card — PROCEED / INVESTIGATE / STOP

What exactly am I agreeing to?

What does it cost?

What could change the cost or schedule?

What does the contract say?

What evidence supports what I am being told?

Is something important about to be signed, paid, demolished, covered, changed, or terminated?

Is local law involved?

Do I need an independent expert?

What happens if I am wrong?

What must happen before I take the next step?

PROCEED — Evidence supports the next step.

INVESTIGATE — A material uncertainty needs resolution.

STOP — The next step is difficult or expensive to reverse and the evidence is not yet sufficient.