



Residential Remodeling Mastery™

Course Worksheets



© 1991 - 2025 Dennis and Teresa Walsh. All rights reserved. These materials, including sales concepts, strategies, forms, and checklists, are for the exclusive use of the original purchaser. Reproduction, distribution, or presentation of any portion for training, resale, or other purposes is prohibited without written permission from the authors.

Users of YourHome.Academy courses and related materials agree to:

1. Accept full responsibility for their use, including compliance with all applicable laws and regulations.
2. Indemnify and hold harmless Dennis and Teresa Walsh from any claims arising from such use.

Dennis J. Walsh and Associates, Inc.

YourHome.Academy | 800.428.1122 | 949.706.3500 | Newport Beach, CA 92660



Table of Contents

Module 1

Course Introduction and a Look at Terminology	1
---	---

Module 2

Introducing the Remodeling Roadmap	1
--	---

Module 3

Maximizing Your Remodeling Return on Investment—Part One	2
Maximizing Your Remodeling Return on Investment—Part Two	3

Remodeling Roadmap In-Depth

Module 4

Preliminary Planning, Scope of Work	4
The Remodeling Planning Checklist	5 - 14

Module 5

Establish Contractor Relationships	15
Types of Residential Contractors	15
Locating Qualified Contractors	16

Module 6

Self-Managed vs General Contractor	17
--	----

Module 7

Pre-Bid Meeting With Contractors	18
--	----

Module 8

Develop Preliminary Cost Estimates and Budget	19
---	----

Module 9

The Remodeling Value Analysis™ (RVA)	20
Residential Remodeling Specialist™ Value Axio	
Homeowner's Value Perspectives™	21

Module 10

Funding Your Remodeling	22
Remodeling Financing Comparison Charts	23, 24

Module 11

Contracts and Financial Management	25
--	----

Module 12

Finalize Details and Begin the Project	26
--	----

Module 13

Managing and Surviving the Project	27
Surviving the Construction Zone	28, 29
Surviving With Contractors	30

Module 14

Final Walkthrough and Closure	31
-------------------------------------	----

A Look at Terminology

1. _____

2. _____

3. _____

4. _____

Introducing the Remodeling Roadmap

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

11. _____

Maximizing Your Remodeling Return on Investment—Part One

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____

Maximizing Your Remodeling Return on Investment—Part Two

14. _____

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

g. _____

15. _____

16. _____

17. _____

18. _____

Preliminary Planning and Scope of Work

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

11. _____

PROPERTY INFORMATION	
Homeowners	Phone
Address	
Mobile/Text	Email
Mobile/Text	Email
Notes	

PRE-REMODELING HOME INSPECTION
<i>Hire a Professional Home Inspector to review the safety and condition of the home including the following:</i>
<input type="checkbox"/> HVAC, electrical, and plumbing
<input type="checkbox"/> Foundations and structural components
<input type="checkbox"/> Driveway, walks, patios, porches, and decks
<input type="checkbox"/> Sewers, septic, drains and utility connections
<input type="checkbox"/> Roofing, gutters, exterior finishes, windows, doors and flashings
<input type="checkbox"/> Walls, floors, ceilings, and attics
<input type="checkbox"/> Radon, lead, mold, and termites
<i>Hire a Professional Engineer to analyze structural integrity and impact of planned remodeling and/or expansion:</i>
Changing walls, floor loads, ceilings, roof framing, windows, doors, openings, etc.

PLANNING AND DESIGN INFORMATION

☐ Identify changing needs, both short term and long term

☐ Determine "Must Do's"

☐ Identify "Should Do's"

☐ Explore "Like to Do's"

☐ Collect design ideas, photos, links

☐ Take measurements of rooms, walls, cabinets, etc.

☐ Hire someone to create floor plans and virtual walk-through

☐ Hire online design service, augmented reality visualizations

☐ Lay out furniture on plans or full scale on floor with painter's tape

Notes

Remodeling Planning Checklist

DEVELOP PRELIMINARY DESIGN

- ☐ Preliminary drawings, renderings, and visualizations
- ☐ Preliminary specifications for products, materials, and finishes
- ☐ Include photos showing examples of design ideas, products, finishes and details
- ☐ Provide photos, videos, and measurements of home for contractors and suppliers
- ☐ Compile Rough Cost Estimates

Notes

ELECTRICAL

- ☐ Main service, subpanels, and meters
- ☐ Replacement of old wiring and outdated equipment
- ☐ Electrical outlets, lighting, switches, and dimmers
- ☐ Home theater and audio system
- ☐ Home security system
- ☐ Internet service, ethernet, and Wi-Fi
- ☐ Appliances, fixtures, and other equipment
- ☐ Exterior lighting, outlets, switches, post lamps and security lighting

Notes

Remodeling Planning Checklist

HVAC / ENERGY EFFICIENCY / GREEN CONSTRUCTION

- ☐ HVAC systems and air quality
- ☐ Insulation, air infiltration, moisture control, ventilation
- ☐ Smart home controls, thermostats, and apps
- ☐ Windows, doors, and skylights
- ☐ Fans, vents and ERV's
- ☐ Energy audit and HERS rating
- ☐ Solar and alternative energy systems
- ☐ Green materials and methods

Notes

PLUMBING

- ☐ Replacement of old piping, valves, and equipment
- ☐ New plumbing to service kitchen and bathroom remodel
- ☐ Water heaters and distribution systems
- ☐ Gas lines for appliances, fireplaces, heating, barbeques, and fire pits
- ☐ Exterior water features, landscape irrigation, hot tub, etc.
- ☐ Faucets, sinks, tubs, toilets, disposal, and accessories

Notes

HOME SITE / LANDSCAPING

- ☐ Grading, drainage, and storm sewers, well and septic
- ☐ New landscaping, tree removal, and protection of existing landscaping
- ☐ Driveway, walks, patios, porches, and decks
- ☐ Pool, hot tub, and water features
- ☐ Fencing, hedges, sound barriers, and privacy features
- ☐ Survey, lot lines, setback requirements, height restrictions
- ☐ Accessory Buildings, ADU, and other outdoor structures

Notes

GENERAL INTERIOR DETAILS

- ☐ Flooring, wall, and ceiling finishes
- ☐ Interior paint, stain, and special wall treatments
- ☐ Flooring replacement and repair
- ☐ Interior doors, slider, pocket, bifold, mirrored and others
- ☐ Locksets and finish hardware
- ☐ Stair finishes, balusters, and railings
- ☐ Drywall, plaster, ceiling repairs and finishing
- ☐ Moldings, cabinets, tops, and built-ins
- ☐ Window treatments, blinds, and draperies
- ☐ Fireplaces, hearths, mantles, surrounds, glass doors and accessories
- ☐ Closets, built-ins, and storage

Notes

<input type="checkbox"/>	Kitchen Layout
<input type="checkbox"/>	Flooring, repair, replacement
<input type="checkbox"/>	Appliances
<input type="checkbox"/>	Cabinets
<input type="checkbox"/>	Cabinet hardware and accessories
<input type="checkbox"/>	Countertops
<input type="checkbox"/>	Counter stools, shelves, wall hooks, etc.
<input type="checkbox"/>	Sinks, faucets, fixtures
<input type="checkbox"/>	Backsplash
<input type="checkbox"/>	Electrical
<input type="checkbox"/>	Plumbing
<input type="checkbox"/>	Pantry, closets, additional storage
<input type="checkbox"/>	Eating Area
<input type="checkbox"/>	Custom built-ins
<input type="checkbox"/>	Paint, stain, and special wall treatments
<input type="checkbox"/>	Windows, doors, trims
<input type="checkbox"/>	Window treatments, blinds, and draperies
<input type="checkbox"/>	Locksets and finish hardware
<input type="checkbox"/>	Stair finishes, balusters, and railings
<input type="checkbox"/>	Drywall, plaster, ceiling repairs and finishing
<input type="checkbox"/>	Water filtration
<input type="checkbox"/>	Fireplaces, hearths, mantles, surrounds, glass doors and accessories

[illegible]

BATHROOMS

- ☐ Fixtures, faucets, bars, and hooks
- ☐ Bathtub and shower doors, curtains, and rods
- ☐ Cabinets, tops, and built-ins, closets, and storage
- ☐ Flooring, wall, ceiling, tub, and shower finishes
- ☐ Electrical outlets, lighting, and switches
- ☐ Internet service, TV, and telephone wiring
- ☐ Windows, doors, natural light, and ventilation
- ☐ Mirrors, furniture, wall art, decorations, and accessories

Notes

BEDROOMS

- ☐ Flooring, wall, and ceiling finishes
- ☐ Electrical outlets, lighting, and switches
- ☐ Internet service, TV, and telephone wiring
- ☐ Cabinets, shelves, desks, and built-ins
- ☐ Closets and storage
- ☐ Doors, windows, egress, natural light, and ventilation
- ☐ Furniture, wall art, decorations, and accessories
- ☐ Insulation and sound proofing

Notes

HOME OFFICE

- ☐ Flooring, wall, and ceiling finishes
- ☐ Electrical outlets, lighting, and switches
- ☐ Internet service, TV, and telephone wiring
- ☐ Cabinets, shelves, desks, and built-ins
- ☐ Windows, doors, natural light and ventilation
- ☐ Furniture, wall art, decorations, and accessories
- ☐ Closets and storage

Notes

LAUNDRY

- ☐ Flooring, wall, and ceiling finishes
- ☐ Electrical outlets, lighting, and switches
- ☐ Internet service, TV, and telephone wiring
- ☐
- ☐ Cabinets, shelves, desks, and built-ins
- ☐ Washer, dryer, and accessories
- ☐ Ironing board, clothes sorting, folding, and hanging
- ☐ Closets and storage
- ☐ Windows, doors, natural light, and ventilation
- ☐ Furniture, wall art, decorations, and accessories

Notes

FITNESS AREA

- ☐ Fitness equipment and layout
- ☐ Electrical outlets, lighting, and switches
- ☐ Flooring, wall, and ceiling finishes
- ☐ Wall racks, shelves, and storage for fitness gear
- ☐ Internet service, TV, and telephone wiring
- ☐ Windows, natural light, and ventilation
- ☐ Furniture, wall art, mirrors, decorations, and accessories

Notes

BASEMENT

- ☐ Electrical outlets, lighting, and switches
- ☐ Flooring, wall finishes and ceilings
- ☐ Wall partitions, exterior wall finish
- ☐ Insulation and sound proofing
- ☐ Doors, windows, egress, natural light, and ventilation
- ☐ Cabinets, shelves, and built-ins, closets, and storage
- ☐ Internet service, TV, and telephone wiring
- ☐ Furniture, wall art, decorations, and accessories

Notes

Remodeling Planning Checklist

GARAGE

- ☐ Flooring, wall, and ceiling finishes
- ☐ Cabinets, storage, wall brackets and shelving
- ☐ Floor repair or finish
- ☐ Lighting, electrical outlets
- ☐ Work bench, hobby area and equipment
- ☐ Overhead door and operator

Notes

OTHER ACTIVITIES AND REQUIREMENTS

- ☐ Zoning Department restrictions, variances, and permit requirements
- ☐ Building Department design, engineering and permit requirements
- ☐ Health Department design, engineering and permit requirements
- ☐ Homeowners Association restrictions and design, engineering and permit requirements
- ☐ Site design, survey, engineering, drainage, erosion protection, and permit requirements
- ☐ Homeowners insurance, construction, risk and liability coverage
- ☐ Contractor references, licensing, bonding, and insurance requirements
- ☐ Utility line, connections, trenching and fees
- ☐ Architectural approval from community, home owners association and/or developer
- ☐ Demolition, trash removal

Notes

Establish Contractor Relationships

Types of Residential Contractors

1. _____

2. _____

3. _____

- | | |
|-------------------|-------------------------|
| • Carpentry | • Wallpaper |
| • Electrical | • Drywall & Plaster |
| • Plumbing | • Insulation |
| • HVAC | • Concrete |
| • Technology | • Masonry & Stonework |
| • Kitchen & Bath | • Granite & Stone Slabs |
| • Flooring | • Excavating |
| • Tile & Marble | • Landscaping |
| • Windows & Doors | • Architect |
| • Siding | • Engineer |
| • Roofing | • Surveyor |
| • Overhead Doors | • Interior Designer |
| • Painting | |

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

Establish Contractor Relationships

Locating Qualified Contractors

1. _____

2. _____

3. _____

- | | |
|-------------------|-------------------------|
| • Carpentry | • Wallpaper |
| • Electrical | • Drywall & Plaster |
| • Plumbing | • Insulation |
| • HVAC | • Concrete |
| • Technology | • Masonry & Stonework |
| • Kitchen & Bath | • Granite & Stone Slabs |
| • Flooring | • Excavating |
| • Tile & Marble | • Landscaping |
| • Windows & Doors | • Architect |
| • Siding | • Engineer |
| • Roofing | • Surveyor |
| • Overhead Doors | • Interior Designer |
| • Painting | |

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

Self-Managed vs General Contractor

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Pre-Bid Meeting With Contractors

1. _____

a. _____

b. _____

c. _____

d. _____

e. _____

2. _____

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

g. _____

h. _____

i. _____

j. _____

Develop Preliminary Cost Estimates and Budget

1. _____

2. _____

3. _____

4. _____

- a. Demolition, rubbish removal, street cleaning
- b. Fencing, security, jobsite cameras
- c. Permits, variances, architectural review fees
- d. Design and engineering fees
- e. Utility upgrades, excavating, drainage, landscaping
- f. Equipment rental, portable toilet
- g. Insurance, legal, accounting fees
- h. Contingency amount

5. _____

The Remodeling Value Analysis™ (RVA)

1. _____

2. _____

3. _____

4. _____

5. _____

Residential Remodeling Specialist™ Value Axiom

The Cost of the _____

and the Cost of _____

have nothing to do with the _____

Home Owner's Value Perspectives™

Different schools of thought regarding the **total investment in your home** relative to its **estimated market value**:

1. _____

Purchase Price + Remodeling Cost is _____
the **Estimated Market Value** of the remodeled home

2. _____

Purchase Price + Remodeling Cost is _____
the **Estimated Market Value** of the remodeled home.

3. _____

Purchase Price + Remodeling Cost is _____
the **Estimated Market Value** of the remodeled home

Funding Your Remodeling Project

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____

Loan Details	Limited FHA 203k	Standard FHA 203k	Fannie Mae HomeStyle®	Freddie Mac CHOICERenovation®
Transaction Type	Purchase or Refinance	Purchase or Refinance	Purchase, Refi, Cash out	Purchase or Refinance
Loan to Value	Up to 96.5% as renovated	Up to 96.5% as renovated	Up to 97% as renovated	Up to 95% as renovated
Maximum Loan Amount	FHA Loan Limits	FHA Loan Limits	Conforming Loan Limits	Conforming Loan Limits
Max Reno Amount	\$75,000	50% of ARV	50% of ARV	75% of ARV
Min Reno Amount	No minimum	\$5000. minimum	No minimum	No minimum
Property Age	At least 1 year old	At least 1 year old	No age requirement	No age requirement
Number of Units	1 to 4 units	1 to 4 units	1 to 4 units	1 to 4 units
Minimum Credit Score	620	620	620	660/varies per lender
Loan Term	15, 20, 25 and 30 years	15, 20, 25 and 30 years	15, 20, 25 and 30 years	15 and 30 years
Eligible Improvements	No structural or luxury	No luxury, structural OK	Structural and luxury OK	Structural and luxury OK
Occupancy	Owner	Owner	Owner and investment	Owner and investment
Reno Time Frame	Up to 6 months	Up to 6 months	Up to 6 months	Up to 12 months
Notes	One unit of multifamily properties Owner primary residence	One unit of multifamily properties Owner primary residence	Can use for up to 4 properties including primary residence	Primary residence, second home, investment property

The above information is provided for illustrative purposes only and can change without notice.
Please confirm with a licensed Loan Officer and your accountant before making any financial decisions.

Loan Details	VA Renovation Loan	USDA Renovation Loan	Renovation Home Equity	FHA Title 1 Home Improvement Loan
Transaction Type	Purchase or Refinance	Purchase or Refinance	Second mortgage	Personal loan
Loan to Value	100% as renovated	100% as renovated	Up to 95% as renovated	Little or no equity OK
Maximum Loan Amount	Conforming	No maximum	\$1,000,000+	\$25,000 for single family
Max Reno Amount	35% of ARV	No maximum	No maximum	\$25,000 for single family
Min Reno Amount	No minimum	Set by lender	Set by lender	No minimum
Property Age	Owned min 12 months	No minimum	Existing home only	Owned minimum 90 days
Number of Units	1 to 4 units	Single unit only	Single unit only	1 to 5 units
Minimum Credit Score	620/per lender	640	700/per lender	Per lender
Loan Term	10, 15, 20, 25 and 30 yrs.	30 yrs.	Maximum 20 years	6 months to 20 yrs.
Eligible Improvements	No luxury or structural	No luxury	No restrictions	No luxury
Occupancy	Owner occupied	Owner primary residence	Owner primary residence	Owners and tenants
Reno Time Frame	Up to 4 months	No requirements	No requirements	No requirements
Notes	Low rates, no PMI, no investment properties Valid VA Builder	Borrower income maximum is 15% above area median income	Benefits of home equity loan based on after renovation value	Also allows \$12,000 per unit up to maximum of \$60,000

The above information is provided for illustrative purposes only and can change without notice.
Please confirm with a licensed Loan Officer and your accountant before making any financial decisions.

Contracts and Financial Management

1. _____

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

Finalize Details and Begin the Project

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Surviving the Remodeling Experience

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____

Surviving the Construction Zone

1. Who is responsible for controlling dust and cleaning up the messes?
2. Who's going to put plastic up on doorways, cover vents?
3. Who's going to cover furniture and other valuables?
4. What areas of the home are off limits or require special permission?
5. Is there a bathroom in the house that's available for use by the workers, or do we need a portable toilet?
6. What days and hours are reasonable for work?
7. How early and how late is it acceptable for loud noise?
8. Where will materials and tools be kept?
9. Where will buckets and brushes be cleaned?
10. At any point during the renovation should we anticipate dangerous fumes or odors?

Surviving the Construction Zone (continued)

11. Are there any times we should plan to leave the house for a few days?
12. How will the grass and landscaping be protected?
13. Who's responsible if damage to the driveway or the landscaping occurs?
14. Who's responsible for protecting interior items such as furniture, flooring, cabinets and appliances?
15. Who will be responsible for any damage that may occur?
16. Who will be responsible for unlocking and locking the house when you're not there?
17. Who will provide advance notice on turning off the water, the power, the heat or other inconveniences?
18. Where will the workers park?
19. Where will deliveries be made?
20. Is loud music and profanity on the jobsite expected or considered acceptable?

Surviving with Contractors

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____

Final Walk– Through and Closure

1. _____

2. _____

3. _____

4. _____