LUXLINE DEVELOPERS
Investor Resource Series

DEVELOPMENT PLANNING

Preliminary Development Investment Plan

A working brief for converting an address, investment idea, or renovation opportunity into a coordinated development hypothesis.

> A property decision gets expensive when the questions are asked in the wrong order. These tools are designed to help an investor slow the process down, identify what must be verified, and create a cleaner handoff to the professionals who will make the project real. — Stephen Brooks, Founder & CEO, Luxline Developers

Use this before design begins

This brief is meant to force alignment among acquisition, design, construction, capital, operations, and exit strategy. Complete it before requesting detailed pricing. A contractor cannot price a moving target, and an investor should not approve a concept that has no decision rules.

Project working name	
Property address	
Luxline pathway	[ ] Residences [ ] Urban Living [ ] Commercial [ ] Custom / mixed-use
Investor / ownership entity	
Prepared by / date	
Target close / start / completion	

1. Investment Thesis and User Outcome

One-sentence thesis	What will be created, for whom, and why should this property support it?
Target customer / occupant	Define the buyer, tenant, operator, or owner—not “everyone.”
Problem being solved	What deficiency in the current property or market does the project address?
Competitive position	Why should the completed property win against available alternatives?
Target hold / exit	[ ] Sell [ ] Refinance [ ] Rent [ ] Owner occupy [ ] Operate business [ ] Other
Success measures	Value, rent, margin, opening date, occupancy, quality, community or operating outcome.

Expert prompt
Separate the physical project from the investment thesis. “Renovate the kitchen” is a scope item. “Create a family-oriented urban home that commands the top of its micro-market without overbuilding the block” is a thesis.

2. Existing Conditions and Verification Plan

[ ] Title, ownership, legal description, easements, and access.

[ ] Boundary and topographic survey.

[ ] Zoning and use confirmation.

[ ] Building code and occupancy classification.

[ ] Structural framing and foundation condition.

[ ] Roof, façade, windows, and water intrusion.

[ ] Plumbing, sewer, water service, and gas.

[ ] Electrical service, panels, and distribution.

[ ] Heating, cooling, ventilation, and controls.

[ ] Environmental hazards and prior site use.

[ ] Historic, floodplain, stormwater, tree, or overlay constraints.

[ ] Tenant, lease, operating, or relocation obligations.

Unknown with highest financial impact	
Verification action	
Responsible professional	
Required by date	

3. Scope Definition by System

System	Existing condition / issue	Proposed intervention	Decision status
Site / exterior			[ ] Define [ ] Verify [ ] Approved
Structure / framing			[ ] Define [ ] Verify [ ] Approved
Envelope / roofing			[ ] Define [ ] Verify [ ] Approved
Interior layout			[ ] Define [ ] Verify [ ] Approved
Kitchen / casework			[ ] Define [ ] Verify [ ] Approved
Bathrooms			[ ] Define [ ] Verify [ ] Approved
Plumbing			[ ] Define [ ] Verify [ ] Approved
Electrical / lighting			[ ] Define [ ] Verify [ ] Approved
HVAC / ventilation			[ ] Define [ ] Verify [ ] Approved
Life safety / accessibility			[ ] Define [ ] Verify [ ] Approved
Finishes / fixtures			[ ] Define [ ] Verify [ ] Approved
Technology / security			[ ] Define [ ] Verify [ ] Approved

4. Basis of Budget

Acquisition and closing	$
Hard construction	$
Site / utility / public work	$
Design and engineering	$
Permits, testing, inspection, and legal	$
Furniture, fixtures, equipment, and owner purchases	$
Financing, taxes, insurance, and carry	$
Temporary conditions / tenant or relocation cost	$
Contingency reserve	$
Total preliminary project basis	$

[ ] State the pricing date and escalation assumption.

[ ] Identify allowances and unresolved selections.

[ ] Track soft costs outside the construction contract.

[ ] Separate owner purchases from contractor scope.

[ ] Reserve for concealed conditions.

[ ] Use a funding source for every cost category.

5. Milestones, Decisions, and Long-Lead Strategy

Milestone / decision	Required input	Owner / lead	Target date	Status
Property control / close				
Survey / due diligence complete				
Concept approved				
Budget alignment				
Permit set complete				
Permit / zoning approval				
Financing ready				
Long-lead release				
Construction start				
Substantial completion				
Occupancy / lease / sale				

Schedule discipline
A date is not a plan until its dependencies, decision owner, approval path, and consequence of delay are visible.

6. Risk Register and Control Actions

Risk	Likelihood	Impact	Control / verification	Owner

[ ] Property / title
[ ] Zoning / permitting
[ ] Structure / concealed condition
[ ] Utilities / environmental
[ ] Capital / financing
[ ] Market / valuation
[ ] Procurement / labor
[ ] Schedule / occupancy
[ ] Neighbor / stakeholder

7. Go / No-Go Development Gate

Decision requested	
Facts confirmed	
Assumptions still driving the plan	
Conditions precedent	
Maximum approved basis	$
Maximum approved time exposure	
Exit if assumptions fail	
Decision	[ ] Go [ ] Go with conditions [ ] Revise [ ] No-Go
Approved by / date	

Stephen Brooks perspective
The purpose of the development gate is not to eliminate uncertainty. It is to make uncertainty explicit, price it, assign it, and define what must be true before more capital is placed at risk.

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