



# Know Your Site

Site-Vision Compatibility Assessment.



NOI + SALE



# What Is KYS?

## The Core Question

---

KYS is a gateway assessment module that answers one critical question:

**Can THIS site deliver what we need for THIS mansion?** It evaluates whether a potential site can accommodate your validated program before capital is committed.

## Why It Matters

Site selection is one of the most consequential decisions in luxury residential development. The wrong site can:

- Compromise your architectural vision
- Limit resale potential
- Result in years of unsold inventory



# The Palazzo Problem

A cautionary tale: a client built an authentic Italian Palazzo in Palm Beach on a site that *appeared* adequate — but had critical misalignments that proved fatal to resale.

## Too Narrow

Only the master bedroom achieved ocean views due to lot geometry.

## Hotel Adjacent

Privacy and context issues that could not be mitigated.

## Wrong Neighborhood

Surrounding homes at \$15–25M created a ceiling below the \$60M+ target.

## No Market

Ornate Palazzo style had zero buyer demand in that micro-market.

**Result:** A magnificent house that hasn't sold in over 4 years. KYS prevents this outcome.

## Primary Outcomes



### GO / NO-GO Recommendation

Clear traffic light assessment with full supporting rationale for every site evaluated.



### Deal-Breaker Detection

Early identification of fatal site issues before capital is committed.



### Multi-Site Comparison

Objective ranking for up to 4 candidate sites evaluated side-by-side.



### KYM Handoff

Site context and market insights flow forward seamlessly into the next module.



## What's Included

**7**

### Assessment Categories

Comprehensive evaluation framework covering every dimension of site suitability.

**31**

### Scoring Factors

Detailed sub-factors, each with precise scoring guides from 1–5.

**10**

### Deal-Breakers

Automatic RED flags triggered by unmovable, fatal site conditions.

**4**

### Sites Compared

Evaluate and rank up to 4 candidate sites simultaneously in one view.



## KYS Position in the N4S Journey

KYS comes after KYM because site assessment requires both the validated program from MVP and market context from KYM. It is the fifth and final pre-acquisition gate.



1

**KYC**

Define client needs & lifestyle



2

**FYI**

Build quantified space program



3

**MVP**

Validate adjacency & spatial logic



4

**KYM**

Establish market context & comps



5

**KYS**

Evaluate site-vision compatibility



## Assessment Steps



Each step builds on the last — from raw site data entry through scoring, deal-breaker validation, multi-site comparison, and final handoff documentation for the KYM module.

## Data Flow: Inputs & Outputs

### Inputs Into KYS

- **KYC:** Budget and vision parameters
- **FYI:** Target square footage and levels
- **MVP:** Validated tier and adjacencies
- **KYM:** Comps, demographics, neighborhood context

### Outputs From KYS

- **GO / NO-GO** recommendation
- **Constraint** documentation
- **Deal-breaker** log
- **Site selection** report





## Traffic Light System

Every KYS assessment resolves to one of three traffic light outcomes based on the weighted composite score across all 7 categories.

 **RED — Score 0.0–2.4**

Fundamental misalignment. Do not acquire.

 **AMBER — Score 2.5–3.9**

Concerns exist. Proceed only with documented mitigation strategy.

 **GREEN — Score 4.0–5.0**

Strong alignment. Proceed with acquisition.

**Override Rules:** Any triggered Deal-Breaker forces RED. Two or more RED categories force RED.

Three or more AMBER categories cap the result at AMBER — it cannot be GREEN.

# The 10 Deal-Breakers

These conditions trigger an automatic RED regardless of overall score. If a client proceeds despite RED, the waived deal-breaker is documented for full accountability.

**DB1**

Lot geometry incompatible with vision massing

**DB2**

Primary views cannot be achieved for principal rooms

**DB6**

Fixed-vision client with site requiring major compromises

**DB7**

Zoning prohibits intended use or scale

**DB3**

Adjacent commercial/institutional context mismatch

**DB4**

Neighboring values create price ceiling below target

**DB8**

Historic/design review would block key elements

**DB9**

Geotechnical conditions make construction infeasible

**DB5**

Style vision has no absorption history in market

**DB10**

HOA covenants prohibit intended style or features

## Scoring Scale

Every factor is scored 1–5 by the advisor. Scores are weighted by category and aggregated into the composite traffic light result.

**1****Score 1 — Critical**

Fundamental problem. Likely triggers deal-breaker review.

**2****Score 2 — Concerning**

Significant issues requiring serious mitigation planning.

**3****Score 3 — Acceptable**

Some concerns present but workable with documentation.

**4****Score 4 — Good**

Minor issues only. Site performs well on this factor.

**5****Score 5 — Excellent**

Ideal conditions. No issues identified.

# Assessment Factors: Physical Site & Views

## 1. Physical Site Capacity (15%)

- 1.1 Lot dimensions & geometry
- 1.2 Buildable area vs. total
- 1.3 Topography and grade
- 1.4 Orientation flexibility
- 1.5 Geotechnical conditions

## 2. Views & Aspect (18%)

- 2.1 Primary view quality & permanence
- 2.2 View breadth (% of principal rooms)
- 2.3 Solar orientation
- 2.4 Exposure to elements

## 3. Privacy & Boundaries (15%)

- 3.1 Setbacks from boundaries
- 3.2 Visual screening potential
- 3.3 Acoustic separation
- 3.4 Elevation relative to neighbors
- 3.5 Entry sequence potential



## Assessment Factors: Context, Market & Regulatory

### 4. Adjacencies & Context (15%)

- 4.1 Neighboring property values
- 4.2 Stylistic harmony
- 4.3 Commercial/institutional proximity
- 4.4 Road noise & traffic
- 4.5 Future development risk

### 5. Market & Demographic (15%)

- 5.1 Style resonance with buyers
- 5.2 Price positioning vs. comps
- 5.3 Absorption history
- 5.4 Buyer demographic match

### 6. Vision Compatibility (12%)

- 6.1 Vision manifestation potential
- 6.2 Required compromises
- 6.3 Client flexibility index

### 7. Regulatory & Practical (10%)

- 7.1 Zoning & FAR constraints
- 7.2 Height & envelope restrictions
- 7.3 Historic/design review
- 7.4 Permitting complexity
- 7.5 HOA/community covenants



# KYS: The Right Site for the Right Vision

KYS ensures that every capital commitment is backed by rigorous, objective site-vision compatibility analysis — protecting clients from costly misalignments before they become irreversible.

## 7 Categories

Comprehensive weighted framework

## 31 Factors

Granular scoring with clear guides

## 10 Deal-Breakers

Automatic RED for fatal conditions

## 1 Goal

The right site for the right mansion





"Sometimes you make the right decision, sometimes you make the decision right..."



Phil McGraw

Thank You.