

# KYC (Know Your Client) – Documentation

N4S — Luxury Residential Advisory Platform

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## 1. Overview

### What is KYC?

Know Your Client (KYC) is the foundation of your N4S mansion program. This module captures everything about how you live, what you value, and what you need from your home. Every question serves a purpose—your answers directly shape the space recommendations, adjacency requirements, and design guidelines that follow.

Think of KYC as your architectural interview. Just as a bespoke tailor measures more than your waist size, we capture the nuances of your lifestyle that make the difference between a house and your home.

## What Your Answers Determine

### **Space Program**

Which rooms your home needs, their sizes, and how many of each

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### **Adjacency Requirements**

Which spaces should be close, which should be separated, and why

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### **Operational Needs**

Staffing support, service routes, and back-of-house infrastructure

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### **Design Direction**

Style preferences, material affinities, and visual language for your team

## Respondent Types

KYC captures perspectives from multiple decision-makers to ensure the home works for everyone.

### Principal

Primary decision-maker who completes all sections. Captures core project parameters, budget framework, and household composition.

All 8 sections

### Secondary

Spouse or co-decision-maker who provides their own perspective on taste and lifestyle preferences. Selections are additive, not deviations.

2 sections: Design, Lifestyle & Living

## Completion Time

The KYC module captures comprehensive client information across 8 sections. Principal respondents complete all sections while Secondary respondents complete only the taste and lifestyle sections relevant to design alignment.

### Principal

45-60 min

All 8 sections covering portfolio context, household composition, project parameters, budget framework, design preferences, lifestyle, cultural context, and working preferences.

### Secondary

15-20 min

Design Identity and Lifestyle & Living sections only. Captures independent perspective on taste and lifestyle to inform design alignment.

## 2. Workflow

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### KYC Section Guide

Complete each section to build your personalized mansion program. Sections marked with "Secondary" are also completed by the Secondary respondent for design alignment.

P1.A.1

#### Portfolio Context

Your real estate portfolio and this project's role within it.

##### WHAT WE CAPTURE

- Primary residence vs. vacation home vs. investment
- Other properties in your portfolio
- Intended use frequency and duration
- Long-term ownership intentions

##### WHAT IT IMPACTS

- Infrastructure redundancy requirements
- Staff accommodation needs
- Smart home / remote monitoring scope

## P1.A.2 Family & Household

Who lives in or regularly visits your home.

### WHAT WE CAPTURE

- Permanent residents and ages
- Regular visitors (parents, adult children)
- Staff requirements (live-in vs. day staff)
- Pet accommodations

### WHAT IT IMPACTS

- Bedroom count and configuration
- Guest suite autonomy level
- Staff quarters scope
- Accessibility considerations

## P1.A.3 Project Parameters

Physical scope and site constraints.

### WHAT WE CAPTURE

- Target square footage
- Number of levels (including basement)
- Site conditions and buildable area
- Timeline expectations

#### WHAT IT IMPACTS

- Program tier selection (5K/10K/15K/20K)
- Vertical circulation requirements
- MEP complexity level

#### P1.A.4    \$ Budget Framework

Investment parameters and value priorities.

#### WHAT WE CAPTURE

- Construction budget range
- FF&E and landscape budgets
- Value engineering tolerance
- Investment horizon

#### WHAT IT IMPACTS

- Finish level recommendations
- MEP system complexity
- Phasing opportunities

#### P1.A.5    🕒 Design Identity

Secondary

Visual and stylistic preferences for your home.

#### WHAT WE CAPTURE

- Architectural style preferences (9 style categories)
- Material affinities
- Color palette preferences
- Reference projects or designers

#### WHAT IT IMPACTS

- Design DNA profile for your team
- Finish specifications direction
- Consultant selection criteria

P1.A.6

## ♡ Lifestyle & Living

Secondary

How you actually live day-to-day plus space requirements. Includes LuXeBrief Lifestyle (voice-guided), LuXeBrief Living (form-based questionnaire), and Manual Entry panel for space program.

#### WHAT WE CAPTURE

- Entertaining frequency and scale
- Morning and evening routines
- Work-from-home requirements
- Hobbies and collections
- Must-have and nice-to-have interior/exterior spaces
- LuXeBrief Lifestyle: Voice-guided lifestyle interview
- LuXeBrief Living: Form-based space program questionnaire

#### WHAT IT IMPACTS

- Kitchen and dining sizing
- Privacy posture requirements
- Specialty room recommendations
- FYI space program generation
- Direct sync to FYI space selections

#### P1.A.7 Cultural Context

Cultural and regional considerations.

##### WHAT WE CAPTURE

- Cultural background and traditions
- Religious observances
- Regional climate expectations
- Local customs and entertaining norms

##### WHAT IT IMPACTS

- Specialty space requirements
- Kitchen equipment needs
- Orientation and layout preferences

#### P1.A.8 Working Preferences

How you prefer to work with your design team.

##### WHAT WE CAPTURE

- Decision-making style
- Communication preferences
- Review meeting frequency
- Change tolerance

#### WHAT IT IMPACTS

- Project management approach
- Presentation format recommendations
- Approval workflow structure

## **LuXeBrief Integration**

P1.A.6 Lifestyle & Living can be completed via LuXeBrief—N4S's external questionnaire platform that offers two modes for capturing lifestyle and space requirements.

### **LuXeBrief Lifestyle**

#### **Voice-Guided Interview**

AI-powered conversational questionnaire that captures lifestyle nuances through natural dialogue. Responses are transcribed, analyzed, and summarized into a comprehensive lifestyle brief.

- ✓ 10-15 minute audio interview
- ✓ AI-generated lifestyle summary
- ✓ PDF executive summary report

### **LuXeBrief Living**

#### **Form-Based Questionnaire**

Structured 7-step questionnaire that directly captures space requirements with must-have and nice-to-have selections for interior and exterior amenities.

- ✓ 7 comprehensive sections
- ✓ Direct sync to KYC Space Requirements
- ✓ Auto-populates FYI space selections

## DATA FLOW

LuXeBrief Living



KYC Lifestyle & Living



FYI Module

When a LuXeBrief Living questionnaire is completed, responses automatically sync to KYC's Lifestyle & Living section (P1.A.6), which then pre-populates the FYI space program. Clients can review and adjust selections in FYI before proceeding to MVP.

## Completion Tips

 **Answer for how you actually live**

Not how you think you should live. Authenticity leads to better design.

 **Think 10 years ahead**

Consider aging parents, growing children, and lifestyle changes.

 **Both respondents should complete independently**

Don't compare answers until both are finished. Differences are valuable data.

 **You can return and edit**

Answers save automatically. Come back anytime to refine your responses.

### **3. Gates & Validation**

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#### **Data Quality Gates**

KYC data flows downstream to FYI and MVP modules. Incomplete or inconsistent data will cause issues later. These gates ensure data quality before proceeding.

## Completeness Requirements

GATE	REQUIREMENT	IMPACT IF MISSING
Target SF	Must be specified in Project Parameters	Cannot determine tier or generate FYI program
Bedroom Count	Must specify number of bedrooms needed	Cannot size guest wing or generate suite program
Household Composition	At least one family member defined	Cannot recommend accessibility or kids' spaces
Entertaining Profile	Frequency and scale indicators set	Cannot size formal zones or recommend bridges

## Downstream Module Dependencies

Your KYC answers directly control what appears in subsequent modules.

KYC    FYI    →

### Space Program Generation

- Target SF → Tier selection (5K/10K/15K/20K) → Base template
- Bedroom count → Guest suite quantity
- Staff level → Staff quarters and service zones
- Entertaining frequency → Formal space sizing
- Hobbies/collections → Specialty room recommendations

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KYC    MVP    →

### Adjacency Requirements

- Privacy posture → Red flag thresholds
- Staffing level → Service spine requirements
- Entertaining style → Bridge recommendations
- Operating model → Ops Core need

## **Client Intake Protection**

When a client completes the Portal Intake Wizard (P1.A.3 Project Parameters and P1.A.4 Budget Framework), those fields become protected in the advisor's KYC view. A banner displays indicating that client-submitted data is locked to preserve the client's original inputs. The advisor can still view and export the data but cannot edit fields that were submitted through the portal intake.

This protection ensures that the client's stated requirements form the trusted baseline for all downstream modules (FYI, MVP, VMX).

## Privacy Postures

**Planned Feature:** Privacy posture selection will be added in a future update. Currently, MVP uses standard thresholds for all projects.

Your privacy posture selection in KYC determines how strictly MVP enforces separation between zones. Higher privacy = more red flags for adjacency violations.



Casual

Open floor plan friendly. Guests can see into most spaces. Minimal zone separation.

*High tolerance for adjacencies*



Balanced

Standard luxury home. Formal and private zones separated. Recommended for most clients.

*Standard red flag thresholds*



Private

Maximum zone separation. Service completely invisible. Primary suite isolated.

*Strict red flag enforcement*

## Operating Models

Your operating model determines the service infrastructure your home requires.

### ▼ Self-Operated

Family manages all household operations. No live-in staff.

#### Infrastructure Impact:

- Minimal service zones
- No staff quarters required
- Simplified delivery routes
- Package room at entry may suffice

### ▼ Day Staff

Regular housekeeping and/or cooking staff who don't live on-site.

#### Infrastructure Impact:

- Service entry and staff break area
- Enhanced laundry facilities
- Catering support kitchen consideration
- Dedicated service circulation preferred

▼ Full Staff

Live-in staff including house manager, chef, housekeeping, and/or security.

**Infrastructure Impact:**

- Staff quarters with private entry
- Ops Core hub required
- Full service spine separation
- Staff dining/break facilities
- Multiple service elevators may be needed

▼ Estate Management

Professional estate manager with full support team. Often for 20K+ properties.

**Infrastructure Impact:**

- Estate office suite
- Security command center
- Multiple staff housing units
- Commercial-grade kitchen
- Vehicle fleet facilities

## 4. Reference

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### Reference Guide

Definitions and reference information for KYC terminology and concepts.

## Section Code Reference

CODE	SECTION
PRINCIPAL	SECONDARY
P1.A.1	Portfolio Context
✓	—
P1.A.2	Family & Household
✓	—
P1.A.3	Project Parameters
✓	—
P1.A.4	Budget Framework
✓	—
P1.A.5	Design Identity
✓	✓
P1.A.6	Lifestyle & Living (incl. Space Requirements)
✓	✓
P1.A.7	Cultural Context
✓	—

P1.A.8

Working Preferences

✓

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## **Design Identity Categories**

The Design Identity section captures architectural style preferences across 9 categories (AS1-AS9), delivered via the external LuXeBrief taste exploration platform. Each category presents curated architectural imagery for selection.

▼ View Categories

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**AS1 Architectural Period**

Historical era preferences and stylistic anchors

**AS2 Material Language**

Natural vs. manufactured, raw vs. refined

**AS3 Color Temperature**

Warm vs. cool palettes, neutral vs. saturated

**AS4 Spatial Volume**

Intimate vs. grand, horizontal vs. vertical emphasis

**AS5 Light Quality**

Diffused vs. dramatic, natural vs. artificial

**AS6 Formal Expression**

Traditional vs. contemporary, ornate vs. minimal

**AS7 Indoor-Outdoor**

Connection to landscape, threshold preferences

**AS8 Detail & Craft**

Finish expectations, joinery level, bespoke vs. production

**AS9 Contextual Response**

Site integration, vernacular sensitivity, statement vs. stealth

## Entertaining Profiles

▼ View Definitions

### Rarely Entertain

Less than once per month. Formal dining optional. Focus on family-scale spaces.

### Occasional

Monthly gatherings of 8-12 guests. Dining room for 10. Basic bar/wine storage.

### Regular

Weekly entertaining, varied scale. Flexible dining (8-20). Butler pantry recommended.

### Frequent Large-Scale

Multiple events per week, often 30+ guests. Catering kitchen. Event lawn/terrace.

### Professional

Charity events, business entertaining. Commercial-grade facilities. Valet staging.

## Glossary

### ▼ View Definitions

#### **Principal Respondent**

Primary decision-maker who completes all KYC sections. Typically the individual who initiated the project.

#### **Secondary Respondent**

Spouse or co-decision-maker who provides independent perspective on taste and lifestyle preferences. Completes P1.A.5 (Design Identity) and P1.A.6 (Lifestyle & Living).

#### **Privacy Posture**

Client preference for separation between public, private, and service zones. Affects MVP red flag thresholds.

#### **Operating Model**

How the household is managed—from self-operated to full estate management. Determines service infrastructure requirements.

#### **Taste Exploration**

Visual preference assessment using image quads. Produces Design DNA profile for the design team.

#### **Design DNA**

Consolidated taste profile derived from taste exploration results. Guides design direction and consultant selection.