KYC (Know Your Client) Documentation

Know Your Client Guide

N4S — Luxury Residential Advisory Platform

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

- **Adjacency Requirements**

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

- **Operational Needs**

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

- **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.

Respondent	Role	Sections
Principal	Primary decision-maker who completes all sections	All 8 sections
Secondary	Spouse/co-decision-maker providing independent perspective	2 sections: Design, Lifestyle & Living

Completion Time

Respondent	Time	Scope
Principal	45–60 min	All 8 sections: portfolio context, household, project parameters, budget, design, lifestyle, cultural context, working preferences
Secondary	15–20 min	Design Identity and Lifestyle & Living sections only

2. Workflow

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.

Captures: Primary residence vs. vacation home, other properties, intended use frequency, ownership intentions

Impacts: Infrastructure redundancy, staff accommodation, smart home scope

P1.A.2: Family & Household

Who lives in or regularly visits your home.

Captures: Permanent residents and ages, regular visitors, staff requirements, pet accommodations

Impacts: Bedroom count/configuration, guest suite autonomy, staff quarters, accessibility

P1.A.3: Project Parameters

Physical scope and site constraints.

Captures: Target SF, number of levels, site conditions, timeline expectations

Impacts: Program tier selection (5K/10K/15K/20K), vertical circulation, MEP complexity

P1.A.4: Budget Framework

Investment parameters and value priorities.

Captures: Construction budget range, FF&E;/landscape budgets, value engineering tolerance, investment horizon

Impacts: Finish level recommendations, MEP system complexity, phasing opportunities

P1.A.5: Design Identity [Secondary]

Visual and stylistic preferences for your home.

Captures: Architectural style preferences (9 categories), material affinities, color palette, reference projects

Impacts: Design DNA profile, finish specifications direction, consultant selection criteria

P1.A.6: Lifestyle & Living [Secondary]

How you actually live day-to-day plus space requirements.

Captures: Entertaining frequency/scale, routines, WFH requirements, hobbies, must-have/nice-to-have spaces, LuXeBrief integration

Impacts: Kitchen/dining sizing, privacy posture, specialty rooms, FYI space program generation

P1.A.7: Cultural Context

Cultural and regional considerations.

Captures: Cultural background, religious observances, regional climate expectations, entertaining norms

Impacts: Specialty space requirements, kitchen equipment needs, orientation preferences

P1.A.8: Working Preferences

How you prefer to work with your design team.

Captures: Decision-making style, communication preferences, review meeting frequency, change tolerance

Impacts: Project management approach, presentation format, approval workflow

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.

Mode	Type	Description
LuXeBrief Lifestyle	Voice-Guided Interview	AI-powered conversational questionnaire, 10–15 min audio interview with AI-generated lifestyle summary
LuXeBrief Living	Form-Based Questionnaire	Structured 7-step questionnaire with direct sync to KYC Space Requirements and auto-population of FYI selections

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.

3. Gates & Validation

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

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 and P1.A.4), those fields become protected in the advisor's KYC view. A banner indicates that client-submitted data is locked to preserve the client's original inputs. The advisor can still view and export but cannot edit portal-submitted fields.

Privacy Postures

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

Posture	Description	Adjacency Tolerance
Casual	Open floor plan friendly. Guests can see into most spaces. Minimal zone separation.	High
Balanced	Standard luxury home. Formal and private zones separated. Recommended for most clients.	Standard
Private	Maximum zone separation. Service completely invisible. Primary suite isolated.	Strict

Operating Models

Model	Description	Infrastructure Impact
Self-Operated	Family manages all operations. No live-in staff.	Minimal service zones, no staff quarters, simplified delivery
Day Staff	Regular housekeeping/cooking staff, not live-in.	Service entry, staff break area, enhanced laundry, catering kitchen consideration
Full Staff	Live-in house manager, chef, housekeeping, security.	Staff quarters, Ops Core hub, full service spine, staff dining
Estate Management	Professional estate manager with full team. 20K+ properties.	Estate office, security command, multiple housing units, commercial kitchen, fleet facilities

Reference Guide

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		—

Design Identity Categories (AS1–AS9)

The Design Identity section captures architectural style preferences across 9 categories, delivered via the external LuXeBrief taste exploration platform.

Code	Category	Description
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

Code	Category	Description
AS9	Contextual Response	Site integration, vernacular sensitivity, statement vs. stealth

Entertaining Profiles

Profile	Description
Rarely Entertain	Less than once per month. Formal dining optional. 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, 30+ guests. Catering kitchen. Event lawn/terrace.
Professional	Charity events, business entertaining. Commercial-grade facilities. Valet staging.

Glossary

Principal Respondent

Primary decision-maker who completes all KYC sections.

Secondary Respondent

Spouse or co-decision-maker providing independent perspective on taste and lifestyle.

Privacy Posture

Client preference for separation between public, private, and service zones.

Operating Model

How the household is managed—from self-operated to full estate management.

Taste Exploration

Visual preference assessment using image quads. Produces Design DNA profile.

Design DNA

Consolidated taste profile derived from taste exploration results.