2018 WI Property Assessment Manual

Volume 2 Update

Residential, Apartments, and Agricultural

Eau Claire, Wausau, Green Bay, Madison and Milwaukee

November 2017

Presenters

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Agenda

- Project summary
- Updates to Volume 2
  - Property Record Card change
  - Costing methodology
- New home styles
- Questions

Project Summary

Volume 2 Project Summary

Volume 2

- Property record card definitions and examples
- Listing codes and standards
- Costs for residential, apartments and agricultural improvements
- Last updated for 2001 assessment
- Modifiers provided to 2001 costs through January 1, 2017

Volume 2 Project Summary *(cont.)*

2018 Volume 2

- Data available in PDF/database formats
- Updated base costs and photos for existing structure types
- Timeline
  - Fall 2016 – January 1, 2017 modifiers posted for current V2
  - 2016 DOR Annual Assessor Meeting – DOR outlines project
  - June 2017 – database schemas available to assessors and software vendors
  - Fall 2017 – updated cost manual available in PDF and database formats
  - 2017 DOR Annual Assessor Meeting – training on updated V2
  - Fall 2018 – January 1, 2019 modifiers posted for updated V2

Volume 2 Project Summary *(cont.)*

Assessor vendors contacted (based on MAR data)

- ASDPS
- GVS
- Market Drive
- TCWIN
- Univers/iasWorld
- Patriot
- Vision
- DEVNET
- Govern

Changes and Updates

Cost Format

- Prior V2 – base costs provided as starting point
- New V2 – costs provided are per square foot

Photos

- Assessors and Equalization staff obtained new photos
- Updated photos of existing styles and grades
- Provided photos for new styles and grades

Other Notable Updates

- New dwelling styles
- Added boat storage buildings
- Attachments codes: composite decks is an option
- Geothermal heat
- Railroad spurs
- Septic mounds
- Tanks – pressure steel, underground double, vertical steel

Other Notable Updates *(cont.)*

- Poultry Broiler Houses
  - Changed floor from partial concrete to dirt
  - Base cost for a dirt floor with an adjustment for concrete
  - Adjustment is per square foot
- Milking Parlors
  - Added steel frame and steel siding parlor
  - Increased maximum size on some from 1200 SF to 2000

Other Notable Updates *(cont.)*

- Hog Sheds
  - Change watering system to cost per pen
- Updates to OBY max. and min. sizes
  - Based on user input
- Updated Property Record Card
  - Layout and data changes

CLASS		YEAR					YEAR					YEAR				
		NO AC	PER AC	LAND	IMPTS	TOTAL	NO AC	PER AC	LAND	IMPTS	TOTAL	NO AC	PER AC	LAND	IMPTS	TOTAL
1	RESIDENTIAL															
2	COMMERCIAL															
	AGRICULTURAL															
	1st GR TILLABLE															
	2nd GR TILLABLE															
	3rd GR TILLABLE															
	PASTURE															
	SPECIALTY LAND															
	TOTAL CLASS 4															
5	UNDEVELOPED															
	FALLOW															
	SWAMP															
	WASTE															
	RIGHT OF WAY															
	SPECIALTY LAND															
	TOTAL CLASS 5															
5M	AGRICULTURAL FOREST															
	PRIMARY AG FOREST															
	OTHER AG FOREST															
	TOTAL CLASS 5M															
6	PRODUCTIVE FOREST															
	PRIMARY PROD FOREST															
	OTHER PROD FOREST															
	TOTAL CLASS 6															
7	OTHER - GENERAL AG SITE															
	OTHER - MEGA DAIRY SITE															
	OTHER - CRANBERRY SITE															
	FCL															
	FCL															
	MFL OPEN															
	MFL CLOSED															
	BUILDING ON LEASED LAND															
	EXEMPT															
	OTHER EXEMPT															
	TOTAL															

500 V VACANT D DWELLING O OTHER

505 **STORY HEIGHT**

1.0 1.5 2.0 2.5 3.0

505 **STYLE**

01 RANCH	09 BASIC SINGLE STORY	17 CONDOMINIUM
02 BI-LEVEL	10 FARMHOUSE	18 TOWN HOUSE
03 SPLIT LEVEL	11 VICTORIAN	19 DUPLEX
04 CAPE COD	12 COLONIAL	20 APARTMENT
05 BUNGALOW	13 CONTEMPORARY	21 MANUFACTURED
06 COTTAGE	14 MODERN SINGLE STORY	22 OTHER
07 CRAFTSMAN	15 MODERN MULTI-STORY	
08 PRAIRIE	16 EXECUTIVE MANSION	

505 **EXTERIOR WALL CONSTRUCTION**

1 WOOD	7 BRICK	13 MASONRY VENEER
2 BLOCK	8 STONE	14 SIP
3 STUCCO	9 MASONRY/FRAME	15 LOG
4 ALUM/VINYL	10 HRDBRD/PLYWD	16 HAND-HEWN LOG
5 CEMENT FIBER	11 SHINGLE/SHAKE	17 OVERSIZED LOG
6 METAL	12 EIFS	18 OTHER

510 **AGE**

ERECTED ___ REMODELED ___ EFFECTIVE ___

515 **BASEMENT**

1 NONE 2 CRAWL 3 PART 4 FULL 5 WALKOUT

520 **HEATING**

1 NONE 2 BASIC 3 AIR CON 4 AIR CON (SEP DUCTS) 5 GEOTHERMAL

FUEL TYPE

1 GAS 2 ELECT 3 OIL 4 WOOD/COAL

SYSTEM TYPE

1 WARM AIR 2 ELECT 3 HOT WATER 4 STEAM

525 **LIVING ACCOMMODATIONS**

TOTAL ROOMS ___ BED ROOMS ___ FAMILY ROOMS ___

FULL BATHS ___ HALF BATHS ___ ADDN'L FIXTURES ___ TOTAL FIXTURES ___

ROUGH IN'S ___ WHIRLPOOL ___ HOT TUB ___

530 **KITCHEN RATING** 1 VG 2 GD 3 AV 4 PR

BATHROOM RATING 1 VG 2 GD 3 AV 4 PR

550 **PHYSICAL CONDITION**

1 VG 2 GD 3 AV 4 PR 5 UN

	OTHER FEATURES	AMOUNT
551	MASONRY ADJ [ ] ___ x ___	
552	REC ROOM ___ x ___	
553	WB FP: STACKS ___ OPENINGS ___	
554	METAL FP: STACKS ___ OPENINGS ___	
555	GAS FP ___	
556	BASEMENT GARAGE, NO. CARS ___	
557	BUILT-IN GARAGE, NO. CARS ___	
558	DORMERS, TYPE: _____ _____ L.F.	
559	TOTAL ADDITIONAL OTHER FEATURE AMT	

TOTAL OTHER FEATURES _____

560 GRADE FACTOR AA A B C D E [ ]

COST & DESIGN FACTOR [ ]___

CDU EX VG GD AV FR PR VP UN

LIVING AREAS

570	575	580
BSMT ___	ADD'L FLOOR ___	ATTIC UNFIN ___
FIN BSMT LIV ___	ATTIC FIN ___	½ STORY UNFIN ___
FIRST FLOOR ___	½ STORY FIN ___	UNFIN ROOM ___
SECOND FLOOR ___		

ATTACHMENTS

	1st	2nd	3rd	AREA	AMOUNT
601	1 ___	___	___	___	
602	2 ___	___	___	___	
603	3 ___	___	___	___	
604	4 ___	___	___	___	
605	5 ___	___	___	___	
606	6 ___	___	___	___	

TOTAL ATTACHMENT AMOUNT $_____

ATTACHMENT CODES

11 OFP 21 OMP
12 EFP 22 EMP
13 FR GAR 23 M GAR
29 CARPORT
30 COMPOSITE DECK
31 WOOD DECK
32 CANOPY
33 CONC/M PATIO
34 STN/TL PATIO
35 MS/TERRACE
99 ADD'L ATTACHMENT

DWELLING COMPUTATIONS

	EXT WALL CONST	AREA	VALUE
FIRST FLOOR			
SECOND FLOOR			
ADD'L STORY			
½ STORY			
ATTIC			

BASE PRICE

UNFINISHED	AREA	FACTOR	ADJ AREA
UNFINISHED ROOM	_____	X 1.00	= _____
½ STORY UNFINISHED	_____	X 0.75	= _____
ATTIC UNFINISHED	_____	X 0.50	= _____
PRICE PER SQ FT	_____	X TOTAL AREA	_____

BASEMENT ADJUSTMENT			COST
UNFINISHED ROOM _____	=	+	_____
CRAWL AREA _____	=	+	_____
1ST FLOOR AREA _____	=	-	_____
NET BASEMENT ADJUSTMENT	=		_____

FIN BSMT LIV AREA	SFLA _____	+
HEATING/AC	SFLA _____	±
PLUMBING	5 FIXTURES IN BASE	
TOTAL FIXTURES _____ - 5 = _____ X _____/FX		±
ROUGH IN'S WHIRLPOOL HOT TUB		
ADD'L PLUMBING (_____ x _____) + (_____ x _____) + (_____ x _____)		+
TOTAL OTHER FEATURE AMOUNT	=	+
TOTAL ATTACHMENT AMOUNT	=	+
ADJUSTED BASE PRICE	=	
X GRADE FACTOR _____		
X COST & DESIGN FACTOR _____	=	
X LOCAL MODIFIER _____	RCN =	
X PERCENT GOOD _____	RCNLD =	
X MARKET ADJUSTMENT		
+ OTHER BUILDING IMPROVEMENTS		
+ GROSS BUILDING SUMMARY		
TOTAL IMPROVEMENT VALUE		

ADDITIONAL OTHER FEATURES	AMOUNT
ROOF ADJUSTMENT – METAL	
WHOLE HOUSE GENERATOR	
WD FURNACE IN ___ OUT ___	
1	
2	
3	
4	
5	
6	
7	
8	
TOTAL ADD'L. OTH. FEATURES CARRY TOTAL TO 559	

ADDITIONAL ATTACHMENTS	AMOUNT
1	
2	
3	
4	
5	
6	
7	
8	
TOTAL 99 ADDITIONAL ATTACHMENTS CARRY TOTAL TO 606	

CON/DES/USFL		NO.	EX	VG	GD	AV	FR	PR	VP	UN	UNF
EXTERIOR WALLS											
ROOF & COVER											
WINDOWS & DOORS											
HEATING											
ELECTRICAL											
PLUMBING											
B	REC ROOM										
	FBLA										
	OTHER										
1st	KITCHEN										
	DINING RM										
	LIVING RM										
	BATHROOM										
	POWDER RM										
	BEDROOM										
	FAMILY RM										
	OTHER										
2nd OR ATT	KITCHEN										
	DINING RM										
	LIVING RM										
	BATHROOM										
	BEDROOM										
	OTHER										
3rd	LIVING AREA										
LOCATION		❑ IMPROVING			❑ STABLE			❑ DECLINING			

OTHER BUILDING IMPROVEMENTS

	TYPE CODE	QUAN	CONST.	YEAR BUILT	SIZE	G	HGT	RATE	MODIFI CATIONS	LM	RCN	COND	% GOOD	OB/MA	R C N L D
701	____	__	F M P S O	__ __ __ __	__ __ __ ___	_	___	___ • __	__ __ __ __	_ • ____		__	__ __	__ __	
702	____	__	F M P S O	__ __ __ __	__ __ __ ___	_	___	___ • __	__ __ __ __	_ • ____		__	__ __	__ __	
703	____	__	F M P S O	__ __ __ __	__ __ __ ___	_	___	___ • __	__ __ __ __	_ • ____		__	__ __	__ __	
704	____	__	F M P S O	__ __ __ __	__ __ __ ___	_	___	___ • __	__ __ __ __	_ • ____		__	__ __	__ __	
705	____	__	F M P S O	__ __ __ __	__ __ __ ___	_	___	___ • __	__ __ __ __	_ • ____		__	__ __	__ __	
706	____	__	F M P S O	__ __ __ __	__ __ __ ___	_	___	___ • __	__ __ __ __	_ • ____		__	__ __	__ __	
707	____	__	F M P S O	__ __ __ __	__ __ __ ___	_	___	___ • __	__ __ __ __	_ • ____		__	__ __	__ __	

GROSS BUILDING SUMMARY

ID	USE	CONST	AGE EREC	AGE REM	SIZE	RATE	LM	RCN	COND.	% GOOD	OB/MA	MARKET VALUE
800	TOTAL OTHER IMPROVEMENTS											

MEASURED BY _____ DATE _____ LISTED BY _____ DATE _____ CALCULATED BY _____ DATE _____ REVIEWED BY _____ DATE _____

BUILDING PERMIT RECORD

DATE	NUMBER	AMOUNT	PURPOSE

010

CARD ___ OF CARDS ___

MAP NUMBER ____ ROUTING NUMBER ____ X ____ Y ____

101	102	103	104
NEIGHBORHOOD	LAND USE	LIV UNITS	ZONING

105 NUMBER | STREET NAME

TRANSFER OF OWNERSHIP

GRANTEE	CONV	VOL	PG	200	MO	YR	UNIQUE SALES NUMBER	TYPE	SALES PRICE	SOURCE	VALID

LAND DATA & COMPUTATIONS

			ACTUAL FRONTAGE	EFFECTIVE FRONTAGE	EFFECTIVE DEPTH	ACTUAL UNIT PRICE	DEPTH FACTOR	INFLUENCE FACTOR	LAND USE CODE	LAND VALUE
NONE	300	N								
LOTS	301	L								
1 Regular lot	302	L								
2 Rear lot	303	L								
3 Apartment site	304	L								
4 Waterfront										
SQUARE FEET	311	S	SQ FT				Influence Factors			
1 Primary site	312	S	SQ FT				1 Unimp			
2 Secondary site	313	S	SQ FT				2 Exc Fr			
3 Residual							3 Topo			
4 Waterfront							4 Shape or Size			
ACREAGE	321	A	ACRES		PROD RTG		5 Econ Misimp			
1 Homesite	322	A	ACRES				6 Restric Noncon			
2 Tillable	323	A	ACRES				7 Land Locked			
3 Pasture	324	A	ACRES				8 Corner Alley (+)			
4 Woodland	325	A	ACRES				9 View (+)			
5 Undev	326	A	ACRES							
6 Primary site										
7 Secondary site										
8 Residual										
9 Waterfront										
0 Other										
GROSS	330	G								
1 Irregular lot										
2 Site value										
3 Residual										
4 Waterfront										
0 Minus R.O.W.										

SUMMARY OF VALUES

TOTAL VALUE LAND	
TOTAL VALUE BUILDING	
TOTAL VALUE LAND & BLDGS	

TYPE CODES

1 LAND
2 LAND & BUILDING

SOURCE CODES

1 BUYER
2 SELLER
3 FEE
4 AGENT

VALIDITY CODES

1 VALID SALE
2 Sale involves additional parcels
3 Not open market; not reasonable marketing time
4 Parties under compulsion to act
5 Property changed after sale
6 Related individuals or corporations
7 Liquidation/Foreclosure
8 Financing/Land contracts
9 Included excessive personal property or other (see memo)

402 ENTRANCE CODES

0 Entrance gained
1 Not applicable – Unimproved parcel
2 Entrance and information refused
3 Entrance refused; info at door
4 Currently unoccupied
5 Est. for misc. reasons (see memo)
6 Occupant not at home

INSPECTION WITNESSED BY

NOTES

400 PROPERTY FACTORS

TOPOGRAPHY		UTILITIES		STREET OR ROAD		DWELLING SETBACK		FRONTING TRAFFIC	
LEVEL	1	ALL PUBLIC	1	PAVED	1	MORE THAN NEIGHBORHOOD AVG. 1		LIGHT	1
ABOVE STREET	2	PUBLIC WATER	2	SEMI-IMPROVED	2			MEDIUM	2
BELOW STREET	3	PUBLIC SEWER	3	UNPAVED	3	LESS THAN NEIGHBORHOOD AVG. 2		HEAVY	3
ROLLING	4	GAS	4	PROPOSED	4			NONE	4
STEEP	5	WELL	5	LANDLOCKED	5	SAME AS NEIGHBORHOOD AVG. 3		CUL-DE-SAC	5
LOW	6	SEPTIC	6	SIDEWALK	6				
SWAMPY	7								

401 OWNERSHIP

PRIVATE	1
CITY	2
COUNTY	3
STATE	4
FEDERAL	5
RELIGIOUS	6
FRATERNAL	7
UTILITY	8
PUBLIC SERVICE	9

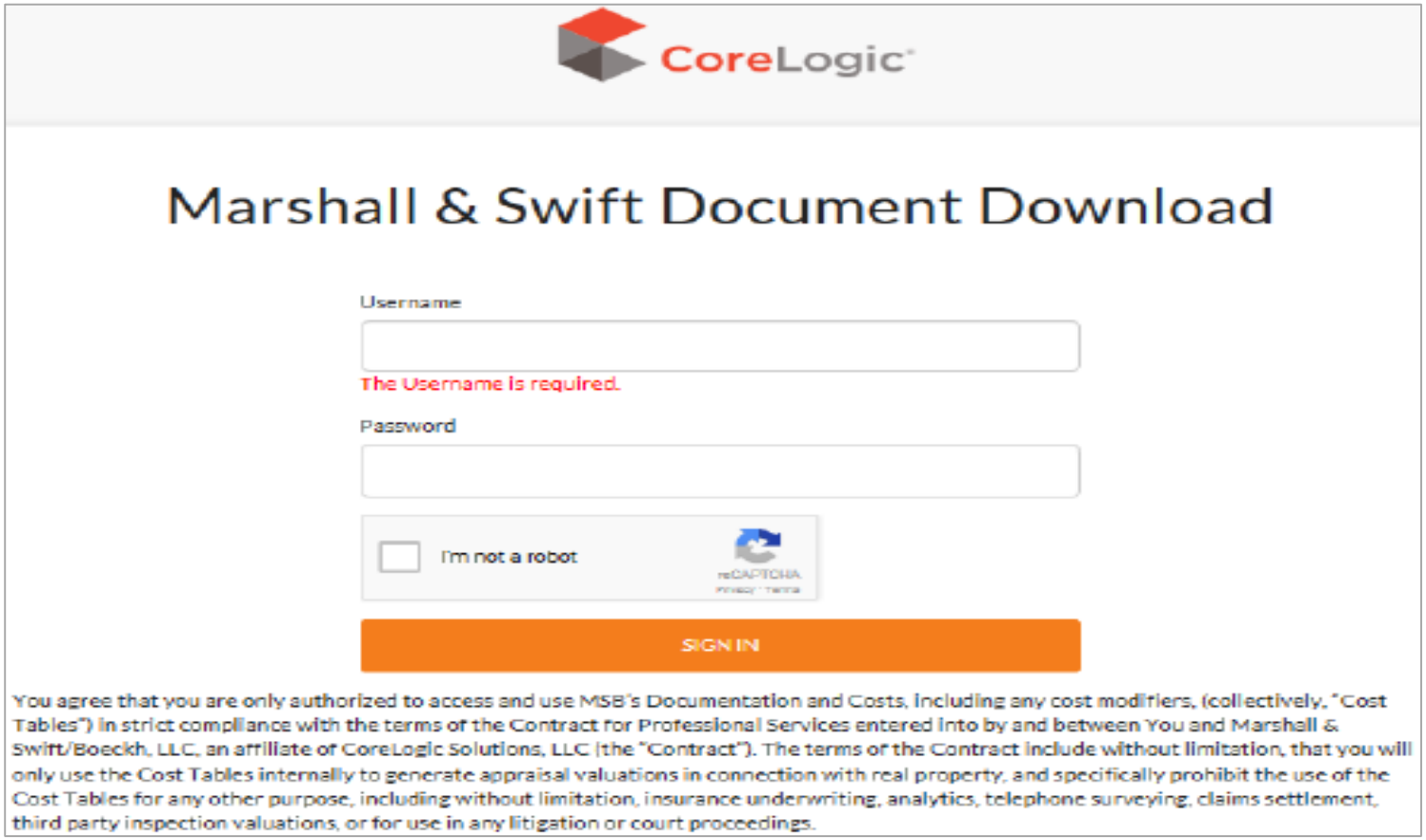
Data Formats

PDF and Database Formats

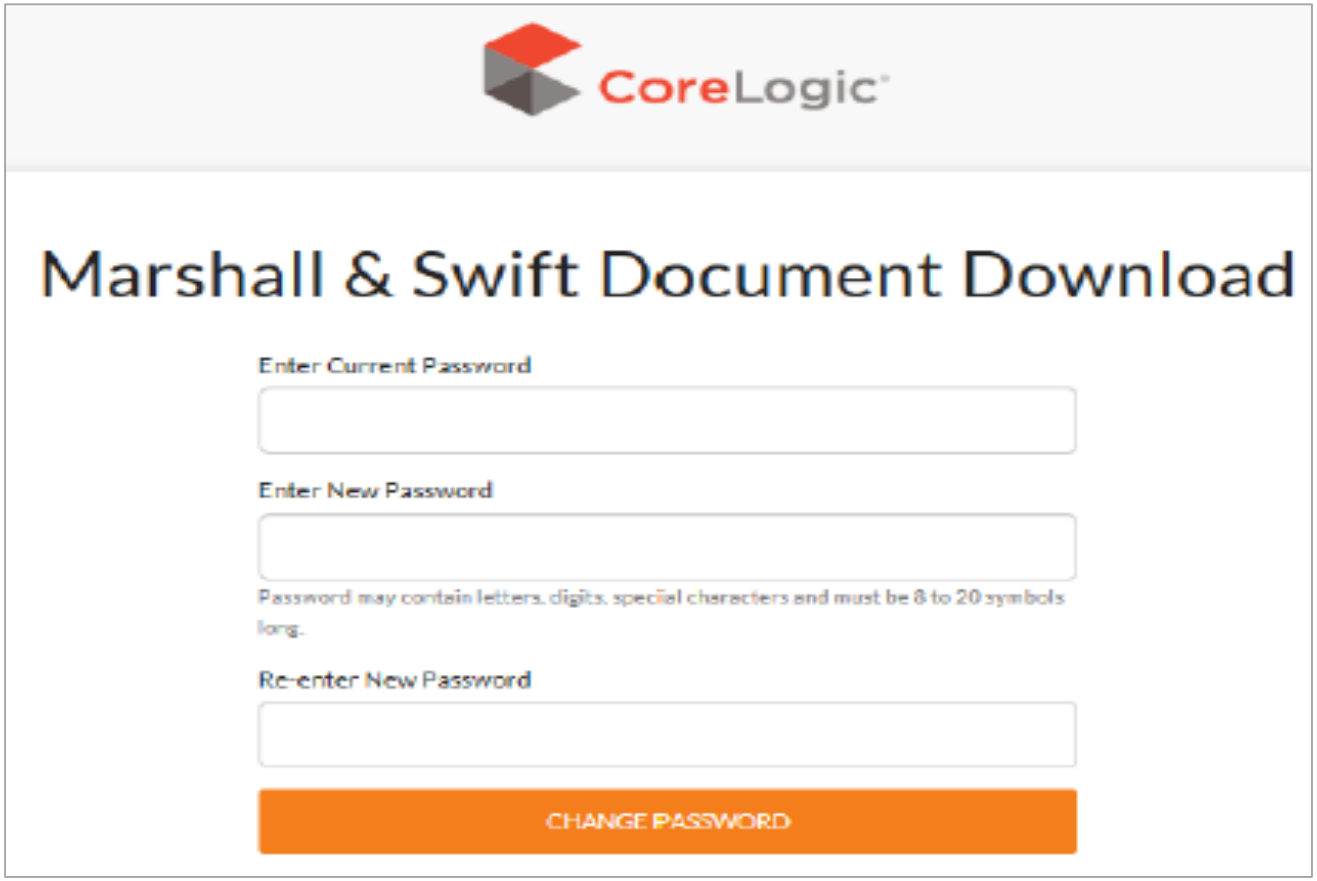
Static PDF

- Version with costs redacted on DOR website
  - https://www.revenue.wi.gov/Pages/HTML/govpub.aspx#property
- Version with costs on Core Logic website
  - https://msdoc.corelogic.com/REGDoc/
  - Requires login credentials provided by Core Log

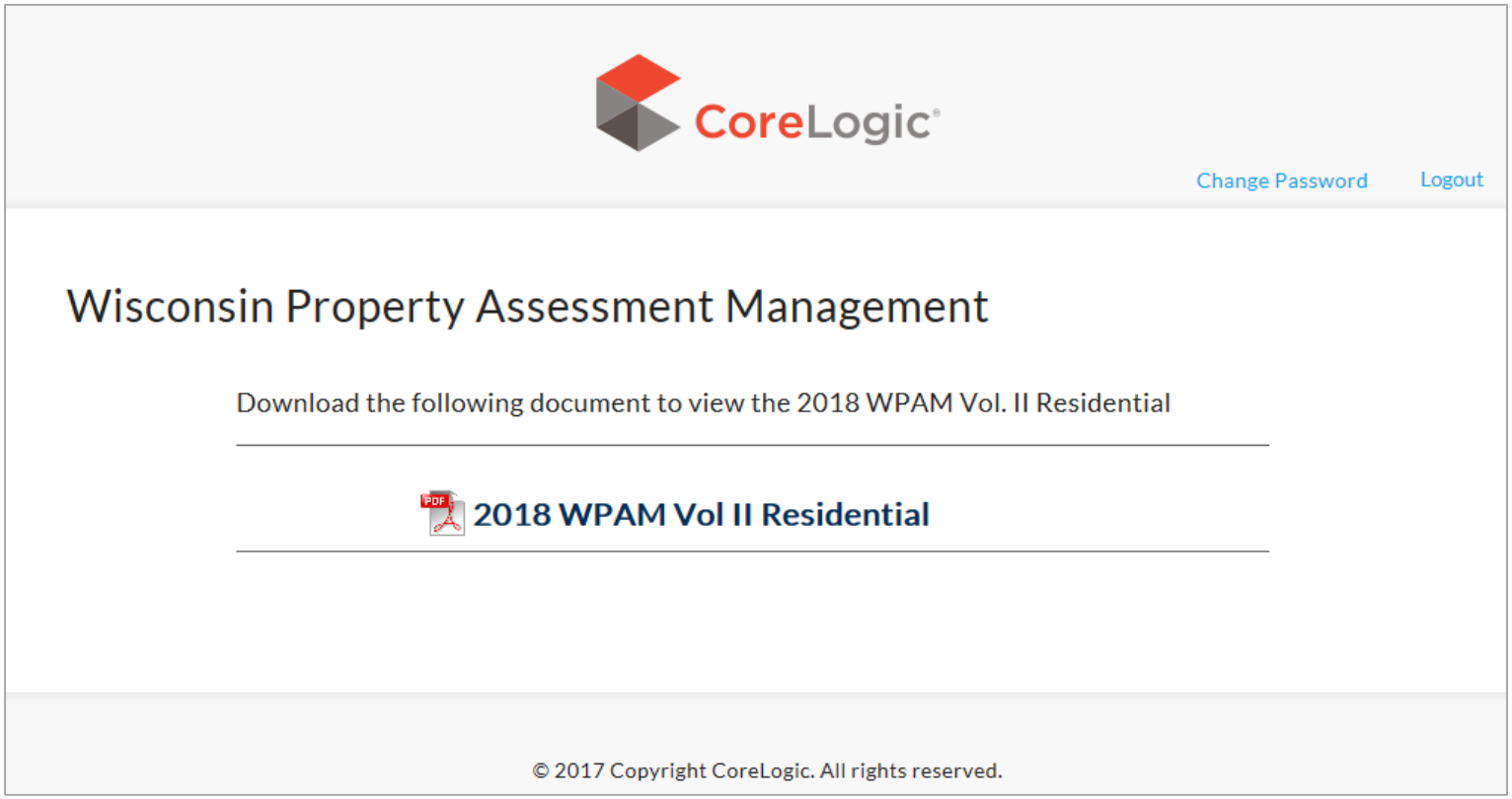
Access the Doc Download Site



Create New Password



Download Manual



PDF and Database Formats *(cont.)*

Database Format

- Available on Core Logic website
  - https://msdoc.corelogic.com/REGDoc/
- Oracle and SQL formats
  - Via SFTP hostname – eft.msbinfo.com
  - CAMA Vendors receive login information from Core Logic

PDF and Database Formats *(cont.)*

Database Format *(cont.)*

- Direct questions about format to Core Logic
  - Ashley Books
  - Direct – (262) 798-3636
  - abooks@corelogic.com
- Questions about WPAM to DOR
  - otas@wisconsin.gov

Volume 2 Training – Home Styles

Volume 2 Training – Home Styles *(cont.)*

01 – Ranch

- Always one-story
- Large window in front
- Low pitched roofs
- "L" or "U" shaped

Volume 2 Training – Home Styles *(cont.)*

06 – Cottage

- Small/plain
- One-story (usually)
- Minimum standards
- Low pitch roof
- Small rooms

Volume 2 Training – Home Styles *(cont.)*

09 – Basic Single Story

- One-story
- Built between 1900-1950
- Small rooms
- Single bath
- Low quality grade
- Poor fenestration

Volume 2 Training – Home Styles *(cont.)*

14 – Modern Single Story

- Built in 21st century
- High ceilings
- Moderate/steep roof pitch
- Hip or multi-gable roof
- Large abundant windows
- Prominent garages

Volume 2 Training – Home Styles *(cont.)*

02 – Bi-Level

- a.k.a. raised ranch
- One-story
- Full bsmt @ 1/2 grade
- Entrance at grade level
- Basement often finished
- Most popular – 1970s

Volume 2 Training – Home Styles *(cont.)*

03 – Split-Level

- a.k.a. tri-level, quad-level
- Staggered living area
- Split roof design
- 2 or more stairways

Volume 2 Training – Home Styles *(cont.)*

04 – Cape Cod

- 1 + attic or 1 .5 story
- Built after 1920s
- Steep roof design
- Dormers

Volume 2 Training – Home Styles *(cont.)*

05 – Bungalow

- One-story
- Porches across front
- Exposed beams
- Wide columns
- Casement/double hung windows
- Often finished attic

Volume 2 Training – Home Styles *(cont.)*

1923 Sears Roebuck California Bungalow kit home

Volume 2 Training – Home Styles *(cont.)*

07 – Craftsman

- Natural materials
- Large porches with columns
- Symmetrical
- Double hung windows
- Exposed brackets
- Built-ins
- 1 – 1 ½ stories

Volume 2 Training – Home Styles *(cont.)*

08 – Prairie

- Low pitched roof
- Strong horizontal lines
- Clerestory windows
- Oversized eaves
- Boxy
- Frank Lloyd Wright

Volume 2 Training – Home Styles *(cont.)*

10 – Farmhouse

- Multi-story
- Simple/functional
- Early to mid-20th century
- Often rural
- Wraparound porch
- Gable roof
- Horizontal siding

Volume 2 Training – Home Styles *(cont.)*

11 – Victorian

- Late 19th century
- Regaining popularity
- Steep roof pitch
- Includes Queen Anne, etc.
- Large porches
- Fenestration

Volume 2 Training – Home Styles *(cont.)*

12 – Colonial

- Two-story
- Rectangular
- Medium slope roof
- Two rooms deep

Volume 2 Training – Home Styles *(cont.)*

15 – Modern Multi-Story

- 21st century popularity
- Multiple exterior wall coverings
- Tall entranceways
- Large windows
- 3-4 car garages

Volume 2 Training – Home Styles *(cont.)*

13 – Contemporary

- Modernistic
- Asymmetrical/angular
- No standard # of stories
- Tall irregular windows
- Often green energy efficiencies

Volume 2 Training – Home Styles *(cont.)*

16 – Executive Mansion

- Luxury homes
- Highest quality
- 3+ baths
- Expansive entries
- Minimum 4000 SF
- Separate cost table
- Separate grading system

Volume 2 Training – Home Styles *(cont.)*

17 – Condominium

- Form of ownership
- Defined by statute
- Divided interest
- Can take many physical forms

Volume 2 Training – Home Styles *(cont.)*

18 – Town House

- Hybrid – Condo/house
- Side-by-side units
- Never stacked
- Style and form of ownership
- Urban but popularity is spreading

Volume 2 Training – Home Styles *(cont.)*

19 – Duplex

- Two-unit residence
- Built after mid-20th century
- Many variations

Volume 2 Training – Home Styles *(cont.)*

20 – Apartment

- Multiple self-contained units
- < 4 units is Residential
- ≥ 4 units is Commercial

Volume 2 Training – Home Styles *(cont.)*

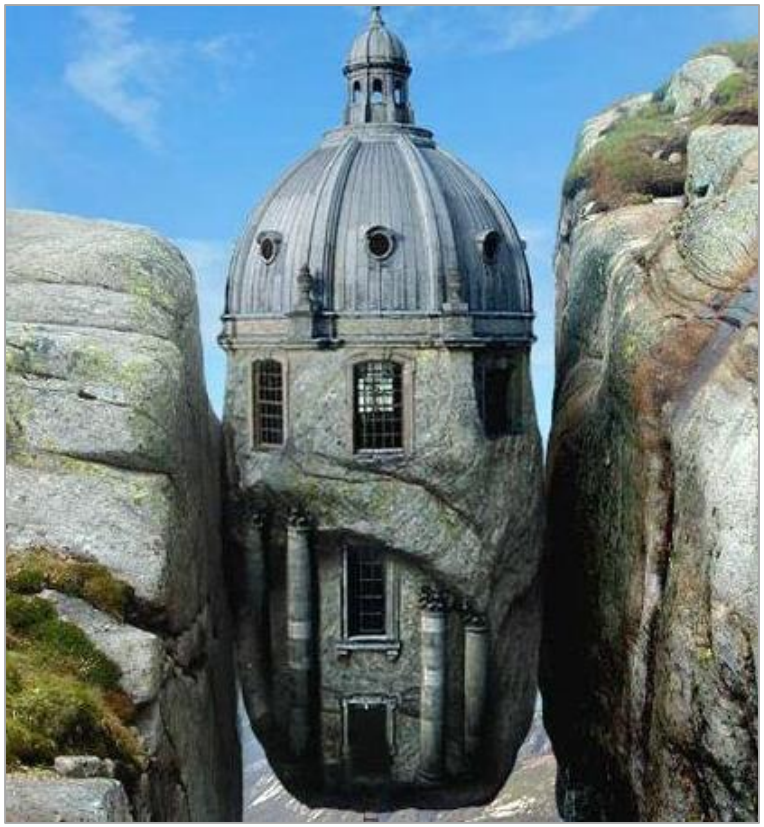
21 – Manufactured

- Factory built under Federal HUD building code
- Single or multi-section
- Transported to site

Volume 2 Training – Home Styles *(cont.)*

22 – Other

Any residence that does not fit into any category defined above. Examples include geodesic homes, earth homes, buildings converted from other uses such as schools or churches.



Style Exercise

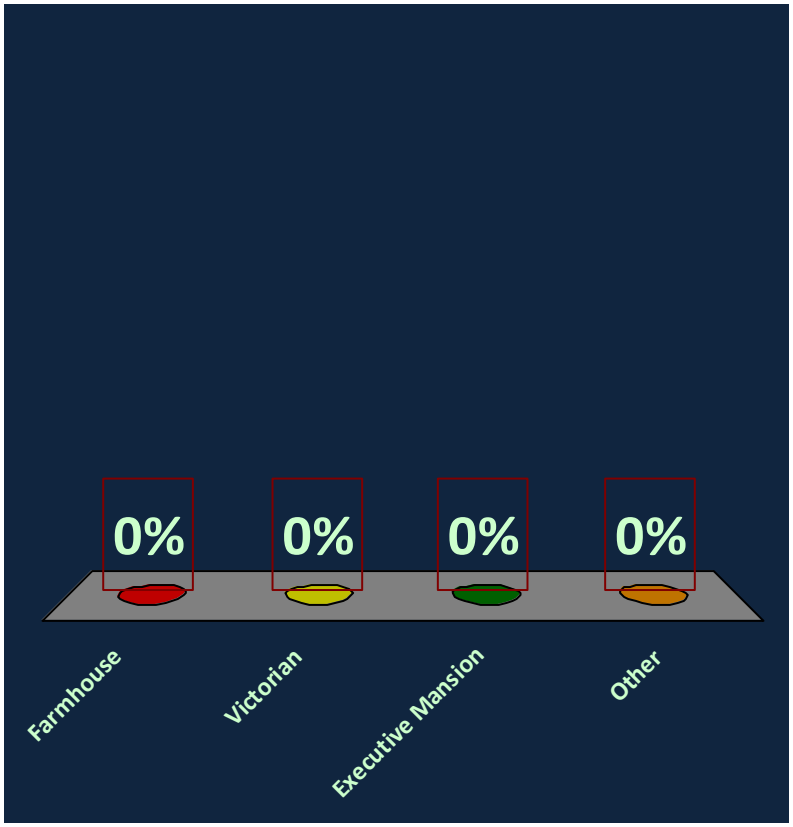
Use your Turning Point clicker to select the most appropriate style from the list.

- Multiple choice
- Choose only one

Style Exercise – Case #1

Case #1 – Select Best Style

A. Farmhouse
B. Victorian
C. Executive Mansion
D. Other



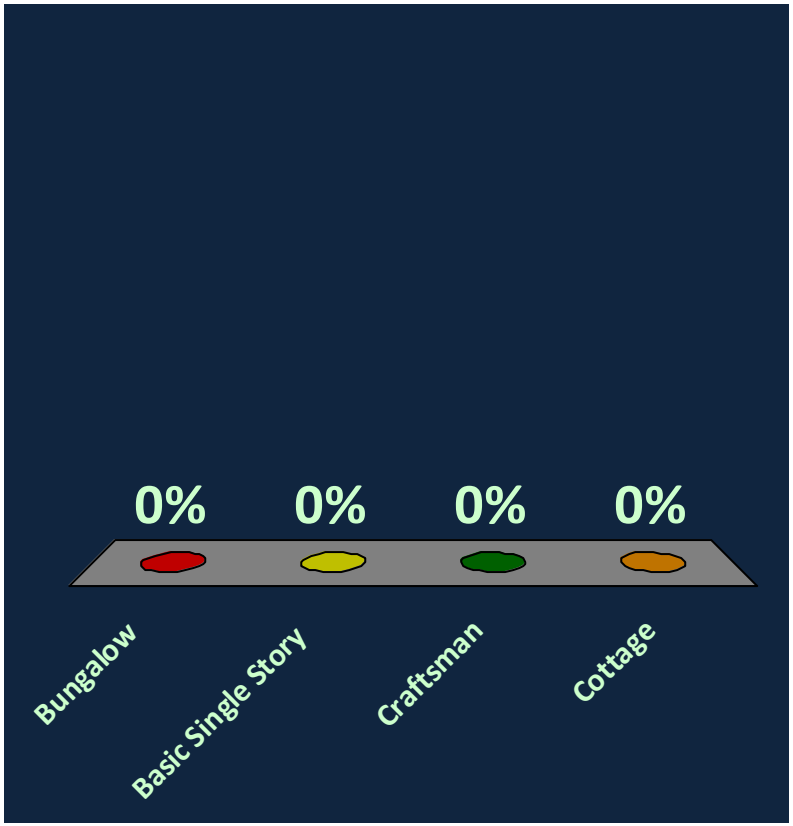
Case #1 – Executive Mansion

- 6100 SF
- 5 baths
- Highest quality components
- Multiple fireplaces

Style Exercise – Case #2

Case #2 – Select Best Style

A. Bungalow
B. Basic Single Story
C. Craftsman
D. Cottage



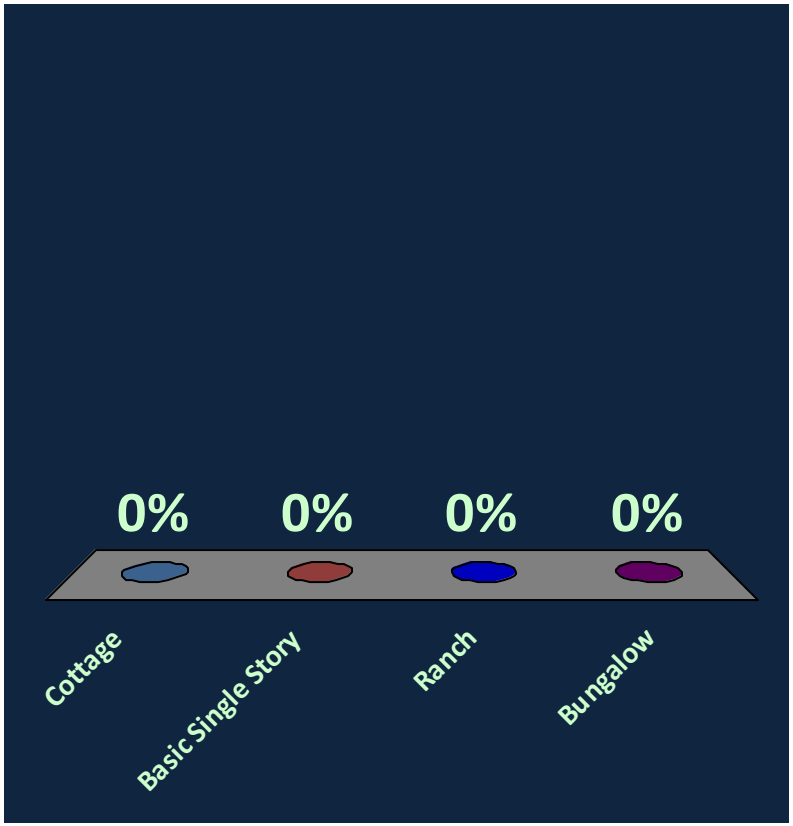
Case #2 – Bungalow

- One Story
- Built in 1927
- Multiple overhanging gables
- Large porch column

Style Exercise – Case #3

Case #3 – Select Best Style

A. Bungalow
B. Basic Single Story
C. Craftsman
D. Cottage



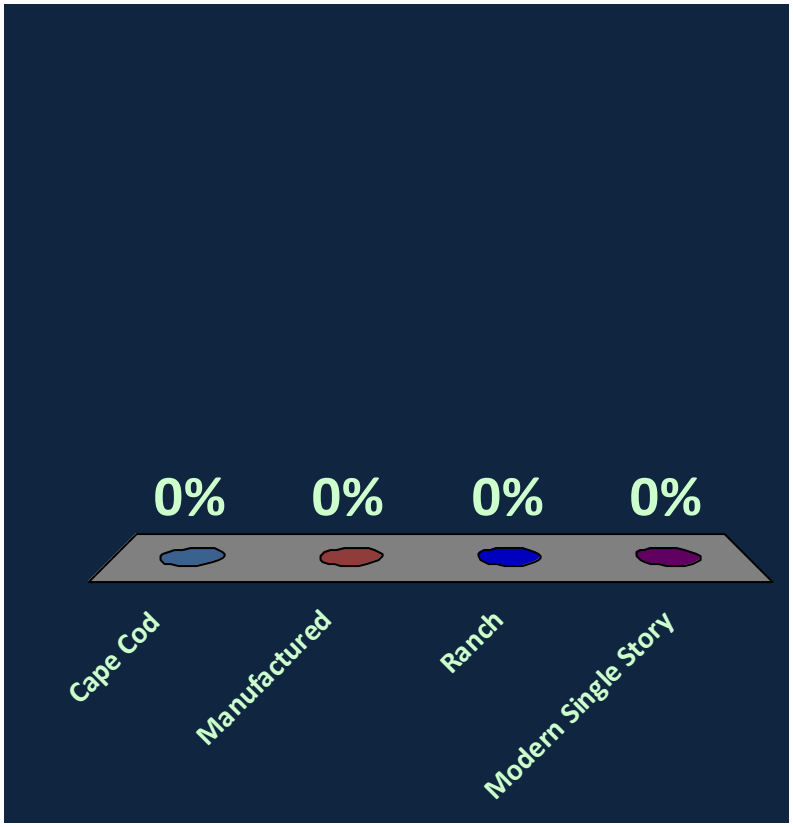
Case #3 – Basic Single Story

- One-story
- Basic
- Low quality
- Minimal fenestration

Style Exercise – Case #4

Case #4 – Select Best Style

A. Cape Cod
B. Manufactured
C. Ranch ✓
D. Modern Single Story



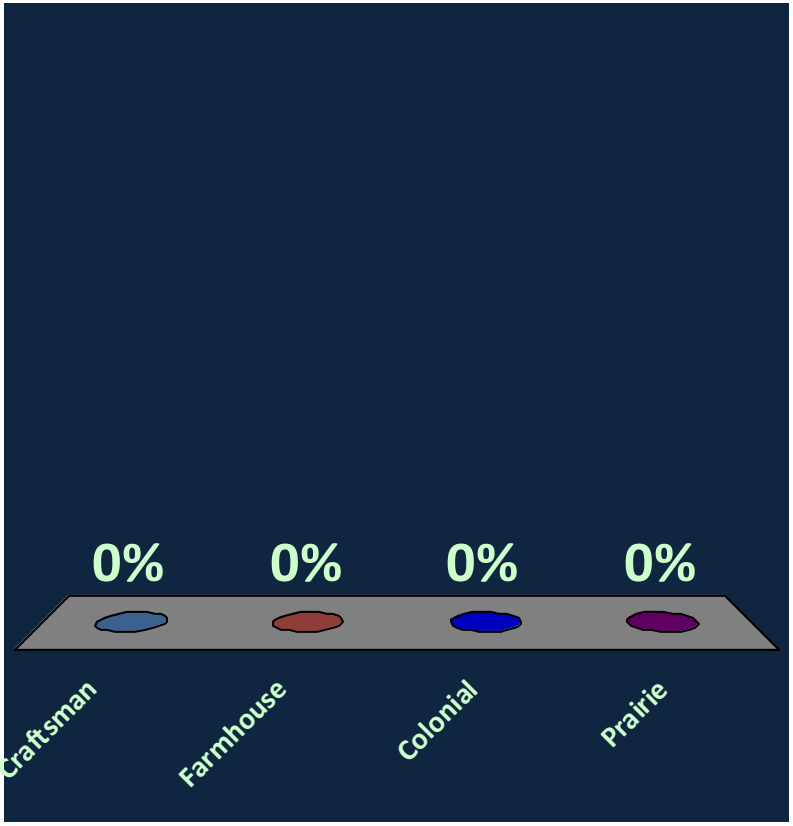
Case #4 – Ranch

- One-story
- Low pitched roof
- Rectangular
- Eave overhangs

Style Exercise – Case #5

Case #5 – Select Best Style

A. Craftsman
B. Farmhouse
C. Colonial
D. Prairie ✓



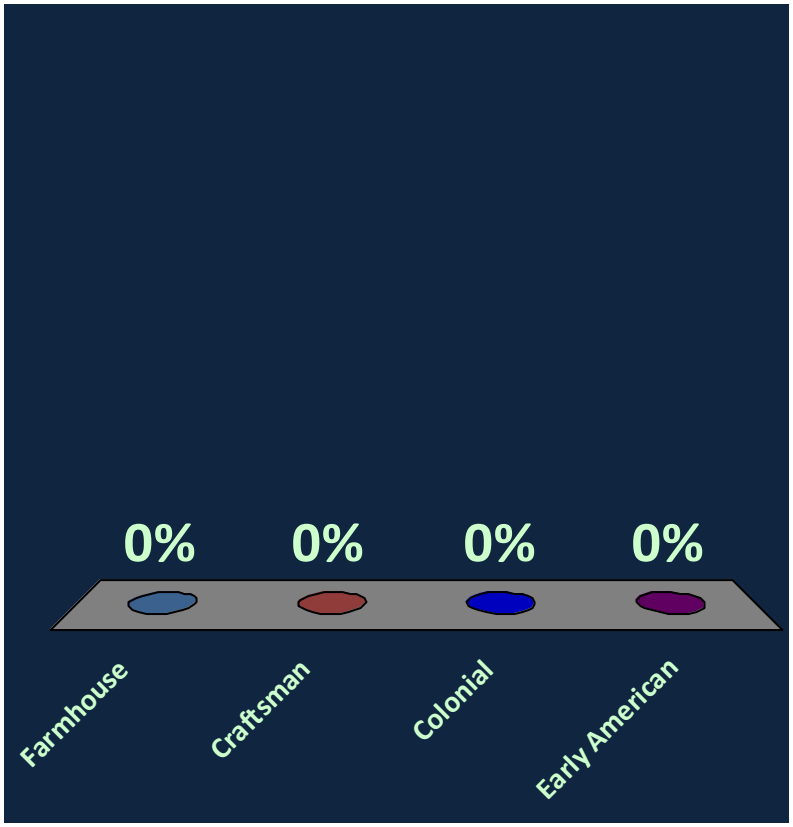
Case #5 – Prairie

- Low pitched roof
- Hip or flat roof
- Boxy
- Excellent fenestration
- Clerestory windows
- Cantilevered overhangs

Style Exercise – Case #6

Case #6 – Select Best Style

A. Farmhouse
B. Craftsman
C. Colonial
D. Early American



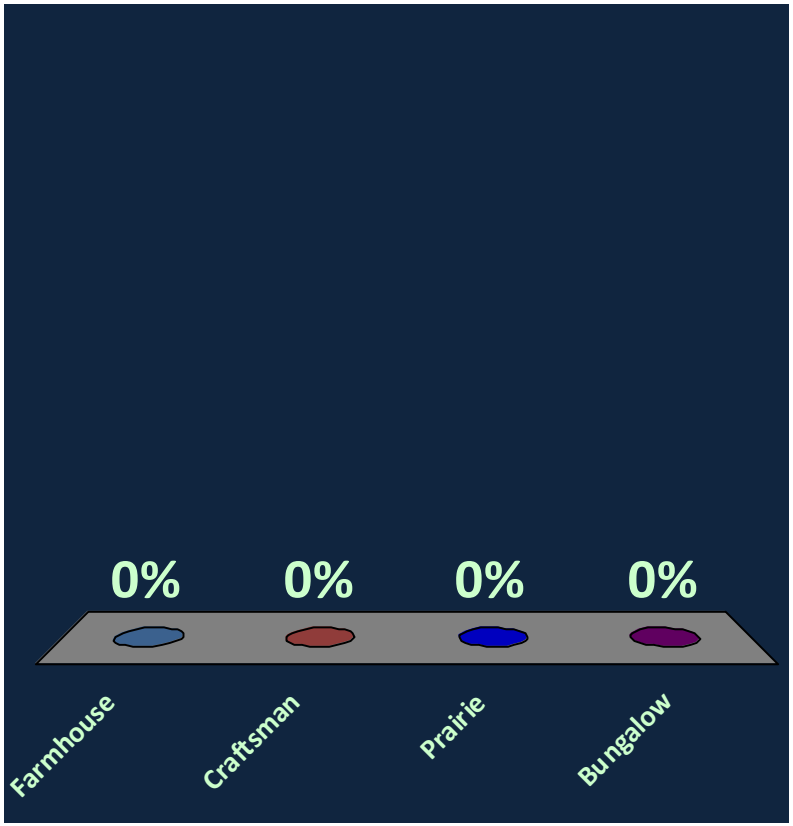
Case #6 – Farmhouse

- Multi-story
- Functional
- Large front porch
- Minimal ornamentation
- Horizontal siding

Style Exercise – Case #7

Case #7 – Select Best Style

A. Farmhouse
B. Craftsman
C. Prairie
D. Bungalow



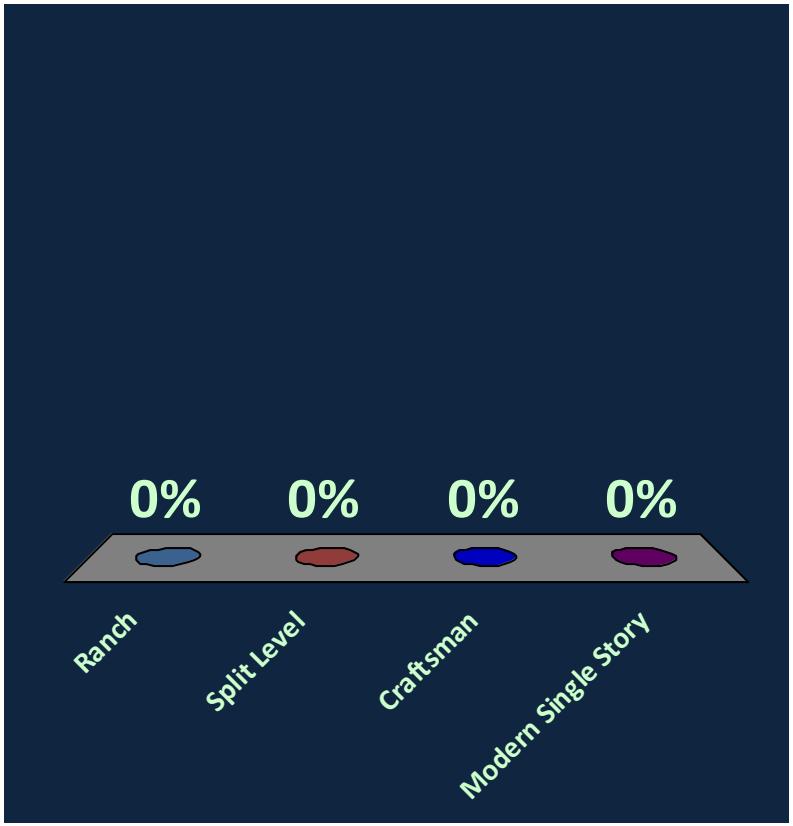
Case #7 – Craftsman

- 1 – 1 ½ Story
- Natural materials
- Large porch columns
- Exposed brackets or rafters
- Double hung windows
- Multi-gabled

Style Exercise – Case #8

Case #8 – Select Best Style

A. Ranch
B. Split Level
C. Craftsman
D. Modern Single Story



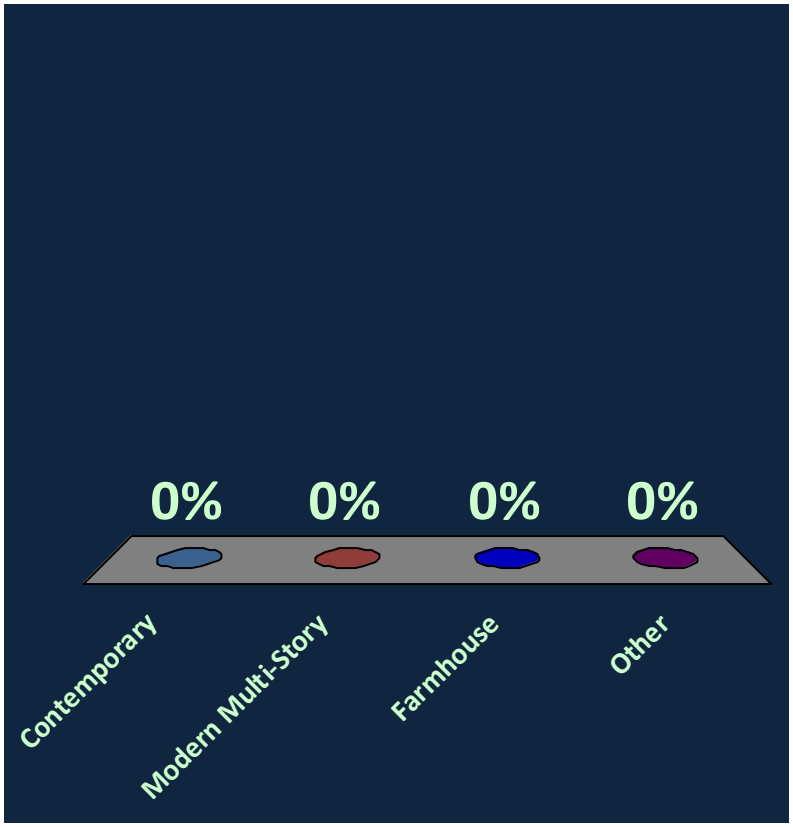
Case #8 – Modern Single Story

- One-story
- Recent construction
- High ceilings
- Moderate to steep roofline
- Hip or multi-gable
- Very good fenestration

Style Exercise – Case #9

Case #9 – Select Best Style

A. Contemporary
B. Modern Multi-Story
C. Farmhouse
D. Other



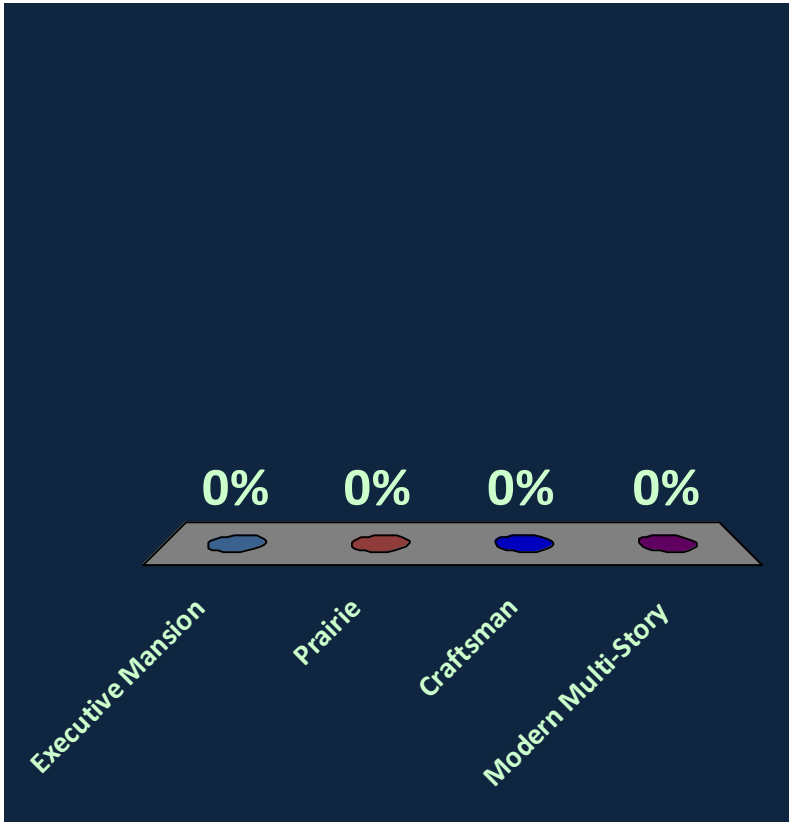
Case #9 – Contemporary

- Modernistic
- Asymmetrical
- Irregular windows
- Uneven roofline
- Hip or multi-gable
- Very good fenestration, much natural light

Style Exercise – Case #10

Case #10 – Select Best Style

A. Executive Mansion
B. Prairie
C. Craftsman
D. Modern Multi-Story



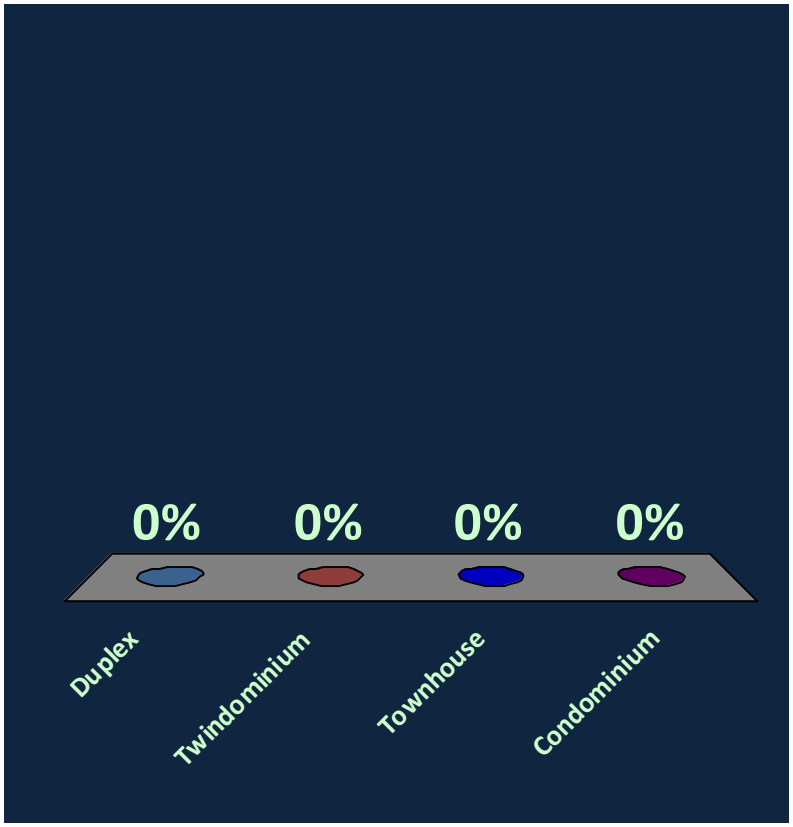
Case #10 – Modern Multi-Story

- Recent build
- Mixed exterior coverings
- Large, abundant windows
- Tall entranceway
- High ceilings

Style Exercise – Case #11

Case #11 – Select Best Style

A. Duplex
B. Twindominium
C. Town House
D. Condominium ✓



Case #11 – Condominium

- Each unit is separately owned
- Divided interest
- Shared responsibility for maintenance
- Tall entranceway
- High ceilings

How did you do?

- Questions/comments?