

# What I need from you

## Forecast Final Account Maintenance

This list explains what I need for this service, why I need it and where you can usually find it. Send the information together where practical. Tell me straight away about anything unavailable or urgent. I will confirm when the essential information is complete and the delivery date is fixed.

Essential items are needed before the relevant work can proceed. Important items affect what I can conclude; optional items add useful context. If an item is missing, incomplete, unreadable or a different version from one already sent, identify it by its number and explain what you hold. I will tell you what replacement is needed, why it matters and any effect on the agreed work or date.

### 1. Variation register with status **ESSENTIAL**

**Why I need it.** The largest moving part of the account.

**Where you'll find it.** The variation register, the instruction file and the surveyor's working notes.

**Without it.** There is nothing to place in the unagreed columns, so the range around the forecast cannot be built and movement since last period cannot be tracked.

### 2. The claims position **IMPORTANT**

**Why I need it.** What is in dispute and what is not.

**Where you'll find it.** The correspondence file, the claim working papers and the site's own records of contra events.

**Without it.** The forecast and its range leave out claims altogether, not because they are worth nothing, but because nothing has been said about them.

### 3. Agreed and disputed items **ESSENTIAL**

**Why I need it.** The distinction that decides the forecast.

**Where you'll find it.** Whatever shows agreement in writing: a certificate, a signed schedule or an email accepting a value. Anything without that paper trail is treated as disputed.

**Without it.** There is no way to tell what is fixed from what is still moving, so the forecast base and the unagreed range cannot be separated at all.

### 4. Contract sum **ESSENTIAL**

**Why I need it.** The base the forecast moves from.

**Where you'll find it.** The commercial folder or the order confirmation.

**Without it.** The forecast has no fixed starting point to move from, so nothing else in it can be built.

## 5. Risk register or allowances OPTIONAL

**Why I need it.** What is provided for but not yet spent.

**Where you'll find it.** Your risk register, or however you track provisional allowances not yet spent, if you keep one.

**Without it.** The forecast simply does not show what is provided for but unspent; nothing else changes.

## How to send it

Everything to [contact@jackbutlerkettle.com](mailto:contact@jackbutlerkettle.com). Original files rather than scans of printouts wherever you have them, and forwarded emails rather than text copied out of them, because the dates and the addressees travel with the original and they often turn out to matter.