

Hard-Asset Opportunity Intake Checklist

A compact first-pass screen for power-adjacent land, data-center land, industrial/logistics sites, cold storage, waste, energy services, and founder-owned industrial operating companies. Use this before a situation becomes memo-ready.

1. Control and source path

Check	What to capture
Asset owner identified	Who owns or controls the asset, company, or site?
Authority to speak	Is the submitter authorized by the seller or directly connected?
Seller motivation	Succession, capital need, expansion, exit, distressed timing, or opportunistic sale.

2. Asset and operating facts

Check	What to capture
Asset type	Land, building, logistics platform, cold storage, waste, energy services, specialty manufacturing, or other.
Location and scale	Address/corridor, acreage, square footage, revenue, EBITDA, capacity, or throughput.
Documents available	Teaser, financials, site details, utility/power data, ownership records, or none yet.

3. Infrastructure screen

Check	What to capture
Power and utilities	Transmission, substation, gas, water/sewer, fiber, and realistic interconnection path.
Zoning and entitlement	Current zoning, permitted use, entitlement path, constraints, and timing.
Access and resilience	Transport access, environmental constraints, flood/fire/grid reliability risk.

4. Memo-readiness

Check	What to capture
Pricing signal	Asking price, valuation basis, recent offers, or indication that pricing is unknown.
Mandate fit	Why the situation fits active family-office or holding-company mandates.
Open questions	What needs verification before principal review or external diligence begins.

5. Initial disposition

Check	What to capture
Review	Enough fact pattern exists to assess fit and next diligence questions.
Watch	Potentially relevant, but source access, pricing, infrastructure, or timing remains incomplete.
Remove	Insufficient source path, weak mandate fit, or facts do not support memo work.

Research-only. This checklist is an intake aid for source-trail and mandate-fit review. It is not investment advice, brokerage, or a recommendation to transact.

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