

# AECC INC. - NEW JOB PROPOSAL / FILE INFORMATION

Once form is complete, please select the buttons  
below to send electronically or print a copy.

|   |                                       |                           |           |
|---|---------------------------------------|---------------------------|-----------|
| Project Name:   |                                       | Street Address:           |           |
|   |                                       | City & State:             |           |
| Project Type:   |                                       | If other, please specify: |           |
| Monthly Draw Reports?   |                                       |                           |           |
| <u>New Construction</u>   | Full Plan Review & Cost Analysis      | <b><u>Level I</u></b>     | (\$\$\$)  |
| If an initial Plan and Cost Review is required, please select Level I, II, or III: (click a "Level" type for a more detailed description) | Limited Plan Review & Cost Analysis   | <b><u>Level II</u></b>    | (\$\$)    |
|   | Cost Analysis Only                    | <b><u>Level III</u></b>   | (\$)      |
|   |                                       |                           | None      |
| <u>Existing Properties</u>  | Full Property Condition Assessment    | <b><u>Level I</u></b>     | (\$\$)    |
| If a Property Condition Assessment is required, please select Level I or II: (click a "Level" type for a more detailed description)       | Limited Property Condition Assessment | <b><u>Level II</u></b>    | (\$)      |
|   |                                       |                           | None      |
| Provider of construction documents:   |                                       |                           |           |
|   |                                       | Primary                   | Secondary |
| Agreement Letter addressed to:  |                                       |                           |           |
| Bank name, contact name, title, address, phone numbers and e-mail   |                                       |                           |           |
|   |                                       | Primary                   | Secondary |
| Borrower / Owner:   |                                       |                           |           |
| Company name, contact name, title, address, phone numbers and e-mail  |                                       |                           |           |
|   |                                       | Primary                   | Secondary |
| Contractor:   |                                       |                           |           |
| Company name, contact name, title, address, phone numbers and e-mail  |                                       |                           |           |

|  |                           |                |
|--|---------------------------|----------------|
| Total Project Square Footage:  | Site Acreage:             |                |
| If project type is commercial,<br>please enter all information available.          | No. of Buildings:         |                |
|  | No. of Floor Levels:      |                |
|  | Proposed Construction:    |                |
| If project type is multi-family,<br>please enter all information available.        | No. of Total Units:       |                |
|  | No. of Buildings:         |                |
|  | No. of Floor Levels:      |                |
| Parking Garage on Property?  | No. of Levels:            | No. of Spaces: |
| Land Development?  | No. of Sections:          | No. of Lots:   |
| If this is an existing property, year it was built?                                |                           |                |
| Hard Cost Construction Budget Amount:  |                           |                |
| AECC's Invoice should be addressed to:   |                           |                |
| Copy of AECC invoice should be sent to:  | If other, please specify: |                |
| Send copy of AECC report to Borrower:  |                           |                |
| If construction has already started, what is the current percentage of completion? |                           | %              |

Additional Comments, Information, and Instructions:

## Types of Reviews:

### Full Plan Review & Cost Analysis – Level I

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Review and become very familiar with the available plans and specifications requested in the document checklist. In general, this will consist of inventorying the documents furnished, a check for the appropriate design professional's seals and signatures and addressing the following:

- a. The report will provide a detailed description of the proposed project, including the site layout, site improvements, and site amenities. We will also include a comprehensive description of the proposed building components and finishes including structural and roofing systems, the exterior envelope and interior finishes. The report will also describe the mechanical, electrical, and plumbing systems, as well as the life safety systems and handicap accessibility.
- b. We will review and provide comments on the Geotechnical Report, environmental studies, zoning approvals, the project schedule and utility availability letters furnished to us. We will examine any surveys provided and note any objectionable features.
- c. We will review the "hard" costs of the project by performing a comparative cost analysis stating whether these anticipated costs are reasonably adequate to construct and complete the project in conformance with the plans and specifications furnished, and comment on the appropriateness of the Contingency allocation. A line item cost comparison of the construction budget will be included as part of the review.
- d. We will review the Owner/Contractor Agreement and associated exhibits commenting on the contract type, retainage requirements, conflicts with the approved budget, and note any other objectionable features.
- e. We will comment on any unusually good or unusually poor design features, quality and suitability of materials, as well as on how the design compares with similar type projects in terms of standard architectural and engineering practices. We will provide a list of outstanding construction documents that were requested, but not received, and a list of items that we feel requires further clarification.
- f. We will advise Client of any recommended changes to the plans and specifications, and comment upon significant omissions and overall coordination among the trades.

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### Limited Plan Review & Cost Analysis – Level II

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Review and become generally familiar with the available plans and specifications requested in the document checklist. In general, this will consist of inventorying the documents furnished, a check for the appropriate design professional's seals and signatures and addressing the following:

- a. The report will provide a short summary description of the proposed project, including the site improvements and site amenities. We will also include a brief description of the proposed building components and finishes including structural and roofing systems, the exterior envelope and interior finishes. The report will also briefly describe the mechanical, electrical, and plumbing systems, as well as the life safety systems and handicap accessibility.
- b. We will perform a preliminary review and provide comments on the Geotechnical Report, environmental studies, zoning approvals, the project schedule and utility availability letters furnished to us on this project. We will examine any surveys provided and note any objectionable features.

- c. We will review the “hard” costs of the project by performing a comparative cost analysis stating whether these anticipated costs are reasonably adequate to construct and complete the project in conformance with the plans and specifications furnished, and comment on the appropriateness of the Contingency allocation. A line item cost comparison of the construction budget will be included as part of the review.
- d. We will review the Owner/Contractor Agreement and associated exhibits commenting on the contract type, retainage requirements, conflicts with the approved budget, and note any other objectionable features.

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## **Cost Analysis – Level III**

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Review and become generally familiar with the available plans and specifications requested in the document checklist with a primary focus on the projected hard cost budget. The report will address the following:

- a. The report will provide a very brief description of the project including the site improvements, the proposed building components and finishes, including structural and roofing systems, the exterior envelope and interior finishes. The report will also briefly describe the mechanical, electrical and plumbing systems.
- b. Consultant will review the total “hard” cost of the project and state whether the anticipated cost is reasonably adequate (on a square foot or unit cost basis) to construct and complete the project in conformance with the plans and specifications furnished.
- c. We will review the Owner/Contractor Agreement and associated exhibits commenting on the contract type, retainage requirements, conflicts with the approved budget, and note any other objectionable features.

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## Types of Assessments:

### Full Property Condition Assessment – Level I

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- a. Review and prepare an electronic report (pdf) to Client, including photographs regarding the present physical condition of the project to include major building components accessible during our site visit. This would include items such as roofing, structural, electrical and mechanical systems and architectural finishes. Also, observe all accessible tenant interiors in commercial properties or randomly review a representative sample (10%) of multifamily units.
- b. Our report will include a summary description of the following aspects of the project:
  - 1. The site, site improvements, and site amenities
  - 2. Building components and finishes, including structural and roofing systems, the exterior envelope and interior finishes
  - 3. Mechanical, electrical and plumbing systems
  - 4. Life safety systems and handicap accessibility
- c. Evaluate and prioritize major construction related deficiencies to Immediate Repair, Deferred Repair, and Recommended Item categories, if any. For these items, provide preliminary cost estimates associated with the construction related deficiencies as well as components which may have been poorly maintained.
- d. In the event that Consultant should observe or have reason to believe an environmental issue(s) exists (i.e., mold, storage tanks, surficial staining, discolored vegetation, etc.), the written report will so state. AECC, INC. is not required to provide a suggested means of remediation, determine the extent of contamination or provide probable costs for remediation.
- e. If available, review copies of the Certificate(s) of Occupancy as issued by the municipal authorities and report on any objectionable features, exceptions to, or violations of building codes and ordinances at the time of project completion.
- f. If available, review the original construction documents, including engineering testing data, soil reports, and environmental studies, zoning approvals, Architectural and Engineer certifications and utility availability letters.
- g. If required, prepare a schedule depicting our estimate of the remaining useful life (Replacement Reserve Analysis) of the project's short-lived items and features for the required number of years.

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## Limited Property Condition Assessment – Level II

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- a. Review and prepare an electronic report (pdf) to Client, including photographs regarding the present physical condition of the project to include major building components accessible during our site visit. This would include items such as roofing, structural, electrical and mechanical systems and architectural finishes. Also, observe a representative amount of the tenant interiors in commercial properties or randomly review a representative sample (5% to 10%) of multifamily units.
- b. Our report will include a brief summary description of the following aspects of the project:
  - 1. The site, site improvements, and site amenities
  - 2. Building components and finishes, including structural and roofing systems, the exterior envelope and interior finishes
  - 3. Mechanical, electrical and plumbing systems
  - 4. Life safety systems and handicap accessibility
- c. Evaluate and prioritize major construction related deficiencies to Immediate Repair, Deferred Repair, and Recommended Item categories, if any. For these items, provide preliminary cost estimates associated with the construction related deficiencies as well as components which may have been poorly maintained.
- d. In the event that Consultant should observe or have reason to believe an environmental issue(s) exists (i.e., mold, storage tanks, surficial staining, discolored vegetation, etc.), the written report will so state. AECC, INC. is not required to provide a suggested means of remediation, determine the extent of contamination or provide probable costs for remediation.

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