



FINANCIAL FIELD SERVICES, LLC

angie.averitt@gmail.com

706-718-4444



My company Financial Field Services, LLC offers

DCA Consultant “Certified Accessibility” Inspections

DCA “Construction Compliance” Inspections

HUD Inspections

I am an experienced consultant in these areas of expertise with over 20 years of HUD, 10 years DCA projects, and 7 years of Accessibility Consulting. I currently have many ongoing projects in all these entities.

If interested in my services, contact me to discuss your company needs and my solutions for a project that will meet ALL State Federal and Local requirements for Architectural & Accessibility Standards and Laws.

Thank you in advance for your confidence in my abilities.

Sincerely,

Angela Averitt

Financial Field Services, LLC
Owner/ Managing Partner
Date: 10/23/2024

References for Three Current Customers

that I have worked with on accessibility issues on HUD & DCA multi-family projects.

1: **J.M. Wilkerson Construction:** Chris Griffeth, Vice President, 678-974-4814

Project: Bethel Towers

2: **The Benoit Group, LLC:** Torian Priestly, Chief Development Officer, 404-213-6524

Projects: Hillcrest Senior and Renaissance at Garden Walk

3: **Walton Construction Services LLC,** Mark Stovall, Senior Project Manager, 770-480-4555

Projects: Walton Chattahoochee, Hillcrest Senior, White Circle II & III, Adamsville Creekside

4: **Columbia Residential:** Robert Barfield, Vice President of Construction Services, 770-713-8683

Projects: Columbia Fayetteville, Columbia Scott Blvd. Quest Commons (DCA)

PROFESSIONAL RÉSUMÉ

ANGIE AVERITT

794 Barkley Crest Circle
Auburn, AL 36830
Mobile: (706) 718-4444

E-mail: angie.averitt@gmail.com

DCA Consultant (10 yrs.)
HUD Multi Family Inspector (18 yrs.)
Woman Owned Small Business Owner (25 yrs.)
Accessibility Consultant (6 yrs.)

CAREER HIGHLIGHTS

- Highly experienced in Multi Family Projects from \$300,000 to \$60 million in funding
- Consistently performs at or above business expectations.
- Strong, engaging leader with experience managing teams and businesses.
- Long track record of being results-oriented and highly competitive.
- Strong interpersonal skills, integrity, and splendid work ethic.
- Adept at building relationships with project owners, contractors, and architects for yearlong projects.
- Proven ability to lead others within a network of working partners on projects.
- Accomplished in reviewing plans and specs for construction, construction contracts, draw documents, and change orders submitted on projects and writing reports on a monthly and a onetime DCA Final Inspection status on the progress of the construction process as well as the completed project.
- **Familiar with the 2018-2023 QAP Qualified Allocation Plan-Threshold & DCA Architectural Manual for Architectural Standards, Multifamily Earthcraft Certifications**
- **Managed Construction Inspections for HOME, 4% & 9% Tax Credit Projects for 10 years.**
- HUD MAP Guide Chapter 13, Accessibility Requirements for UFAS, ADA, and Fair Housing, Task Orders & Modifications for funding forecasts of projects. Have managed construction on HUD EE, HD, Insured and D4, 202 & 811 projects.
- Highly fluent in Microsoft Office Products
- I am very proficient in the requirements for UFAS, ANSI, and Fair Housing & ADA. I have included in the package some HUD projects where I have discovered accessibility items not found by accessibility inspectors during construction as well as accessibility issues when an inspector was not assigned to the HUD project.

PROFESSIONAL EXPERIENCE:

18 years of experience managing operations of multifamily insured and capital advanced projects: analyzing construction drawings and specifications: examining construction properties to determine structural soundness, monitoring construction projects to ensure the quality meets contract agreements and communicating with customers, contractors, architects, and local government officials.

Very familiar with contract award documents such as specifications, bid & contract documents, pay requisition documents, escrow releases and change orders submitted by applicants for Georgia Department of Community Affairs (DCA) projects and HUD's multifamily housing programs.

Perform site visits to observe and report all activities on the projects between the architects, contractors, and subcontractors to determine if they are following the plans & specs, construction remains on schedule and if not report why, determine the work completed against what is on the draw documents each month, on HUD projects perform wage and labor interviews, report any discrepancies or disputes between all parties, and make sure the project is in compliance with handicap accessibility laws and standards.

2020 to 2023: Currently continuing to work with HUD, DCA and a Construction Compliance Inspector for DCA, and as an Accessibility Consultant.

1997 to 2023 Financial Field Services, LLC, 100% Managing Partner/ Owner

I was in the foreclosure recovery, property preservation business for the first 8 years of the company's existence. I worked for AFR & Associates for 4 years, MMSA for 6 years, and Leetex Group & Maiden Assoc. 9 years (I am still working with Maiden & Assoc. & Leetex today).

These companies have the HUD Multi Family contracts in the Atlanta Office. During that time I also worked with PDI, Inc. which covers the Alabama and Florida HUD projects in the Birmingham and Jacksonville offices. I have business relationships with most who work in the Atlanta, Birmingham, and Jacksonville HUD offices for the projects I have managed for HUD. See attached business references sheet.

I presently work for Georgia DCA and have business relationships with several construction consultants: Sherrie Potter, Gary Huggins and others .

2022 & 2023: Current List of Accessibility Projects

Boulevard North
Castleberry Hills
City Lights All
Diamond College Park
Eastgate
Farview
Integral Ashley Scholar Ph 1
Welcome House

2023:

Integral Ashley Scholar Ph 2
Limestone Trail
McIntosh Woods
Residences at Westview
BARGE
Clairmont Senior
First Baptist Church
Hamilton Hills
Meadow Creek
Sugar Creek
Walton at Kennesaw
Walton Crossing
Walton Holly Springs

2015 to 2023: I have been an inspector on 100 plus HUD projects after 2015 that are not listed on this resume'. See attached Current List of ongoing projects.
I presently have 6 projects under construction for HUD.

2004 to 2015 Financial Field Services, LLC

HUD Multi Family Inspector for the following projects in GEORGIA:

Albany Advocacy Resource: 9-10 to 9-11	\$586,000
Baldwin Park: 07-09 to 07-10	\$4,791,683
Empire Building Historic Renovation: 12-10 to 12-11	\$2,615,143
Potemkin Village 07-09 to 07-10	\$6,637,118
Veterans Parkway 11-10-to 05-12	\$20,028,280
Arcadia Courtside 09-09 to 09-10	\$1,650,585
Lakeside Village 01-12 to present	\$19,380,510
Marc VI Group Home 11-11 to 12-12	\$330,218
Marc VII 11-11 to present	\$342,208
Second Neighborhood 01-12 to 01-12	\$888,554
Brighton Park 2007- 2008	\$12,843,360
Farrfield Manor 2007- 2008	\$4,851,719
Albany VI 2007-2008	\$811,695

Camellia Manor 2007-2008	\$2,570,437
Dunson School (Renovation Project) 2007-2008	\$2,737,325
Southwood 2007-2008	\$1,153,950
Ashley Station 2007-2008	\$12,285,496
Water Oaks 2007-2008	\$2,288,142
Walton Bluegrass	\$17,858,868 up to 2015

HUD Multi Family Inspector for the following projects in ALABAMA:

Madison Park 06-10 to 06-11	\$5,976,956
Glen East Phase One 07-10 to 07-11	\$3,370,600
Glen East Phase Two 08-11 to 08-12	\$3,371,613
Heron Cove 08-11 to 08-12	\$8,172,682
Fox Run 8-10 to 8-11	\$11,373,685
Summerlake 05-10 to 05-11	\$17,754,707
Edge @ Troy 03-12 to 03-13	\$11,862,136
Wiregrass Rehab 10-13-10-14	\$660,641
Riverchase	\$33,957,438

HUD Multi Family Inspector for the following projects in FLORIDA:

Springcreek 06-10 to 06-11	\$15,961,759
Arbours @ Defuniak Springs 7-10 to 7-11	\$7,105,016
Sand Dunes 104unit renovation 01-12 to 12-14	\$2,580,029

Previous: DCA Projects Multi Family

Clover Bridge: Monthly Inspections	\$2,332,824
Bridgeway Village: Monthly Inspections	\$2,454,756
Poplar Point: Final Inspection	\$8,315,448
Farmington Hills: Final Inspection	\$7,160,349
Myrtle Terraces: Final Inspection	\$7,284,527
Providence @ Cascade: Final Inspection	\$8,690,964
City Lights: Monthly Inspections	\$7,298,477
Tanglewood Heights: Final Inspection	\$6,851,006
Pointe North Phase I: Final Inspection	\$5,580,300
School Street: Final Inspection	\$9,938,500
Reynoldstown: Final Inspection	\$7,165,542
North Grove: Final Inspection	\$7,638,000
Southwestern Estates: Final Inspection	\$7,016,182
Forest View	\$2,203,624
Southfork Apts.	\$7,506,551
Campbell Place	
Gardens at Harvest	
Pointe North Phase I: Final Inspection	\$5,580,300
Centennial Place Phase 1	\$9,328,544
Griner Gardens	\$5,784,715
Residences at West Haven	\$5,921,983
Tindall Towers	\$10,749,841
Point North Phase II	\$4,612,887
Bear Creek Village	\$6,075,024
Mercy Park: Monthly Inspections	\$8,413,592
Gateway Capitol: Monthly Inspections	\$15,104,405

I have been assigned to more than 85 projects for DCA since 2015.

Professional References:

HUD Atlanta Office:

Harry Roberts Senior Construction Analyst Harry.T.Roberts@hud.gov 678-732-2029

Larry Ferguson Senior Construction Analyst Larry.W.Ferguson@hud.gov (678)732-2405

HUD Alabama Birmingham Office:

Brian Van Dorsten Construction Analyst Brian.K.VanDorsten@hud.gov (205) 745-4443

HUD Florida Jacksonville Office:

John Southerland Construction Manager john.g.southerland@hud.gov (904) 208-6014 (Retired)

Georgia Department of Community Affairs Office:

Donna Tyler Construction Service Manager Donna.Tyler@dca.ga.gov (404) 679-3117

Sherrie Potter Assistant Office Director Sherrie.Potter@dca.ga.gov 404-773-2799

Gary Huggins Construction Manager Gary.huggins@dca.ga.gov 404-679-0639

Business References:

Vickey Roberts, HCCP, HDPF | Transaction Services Manager 404.614.8305 vroberts@investatlanta.com

Trey Williams | Vice President of Operations Integral Development, LLC twilliams@integral-online.com

Mark McKibben: Pucciano- English Architects 470-395-8402 mmckibben@studio4hd.com

Christina Davis: Senior Project Manager, Columbia Residential 404-354-0550 cdavis@columbiare.com

Mark Stovall Walton Construction, Senior Project Manager, mstovall@wcsatl.com

LaNorris Nixon, Vice President Development & Construction, The Benoit Group, lnixon@thebenoitgroup.com

GEORGIA DEPARTMENT OF COMMUNITY AFFAIRS

**Construction Compliance Inspection Report
SENIOR Housing**

DCA Const. Comp. Rpt. # 13 DCA Project # 21-010

**ALEXIS PARC
343 Roseland St. NE Marietta, GA.**

Inspection Date: 01-29-24

**Inspected by:
Angela Averitt
Cody Kennon
Financial Field Services, LLC**

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I. PROJECT DESCRIPTION

Owner: Alexis Parc Senior, L.P.

Developer: Alexis Parc Senior, L.P.

Contractor: Walton Construction Group, LLC

Architect: Geheber Lewis & Associates

Unit Amenities--application requirements:

HVAC, Stove, Energy Star Refrigerator, Dishwasher, Water Heater & Bath Fans, Microwave, Garbage Disposals, Plumbing Fixtures, Powder Based Suppression Canisters under range hood, Washing machine hook-ups in units, 80% fluorescent lighting.

Site Amenities:

Community Room, Computer Room, Fitness Room, Wellness Center

Large Covered Pavilion on back of Community Center

Senior Projects: elevator, furnished gathering areas (yes), all units be adaptable & accessible units.

Energy Efficiency: Earthcraft

Accessibility: This is a LIHTC project with 61 affordable units and 15 market units so it require 5% accessible units.

Total Units: 76 units

Accessible Units/hearing impaired: 2% is 2 units but contractor is making full 5% accessible which is 4 units.

Roll-in Showers 40% of HC units Total Units? 2 Project meets "Section 504"? Yes

Project Description:

New Construction

One building with 4 stories, constructed of brick, hardi siding with a 30-year warranted roof

Unit mix: 42 - 1 bedrooms, 34- 2 bedrooms

Total of 76 Units

Sits on 2.26 acres

From Plans: Regular parking spaces 74: Accessible parking spaces 5: Total parking spaces 79: Van spaces?

Onsite Today: 01-29-24

All units on all floors have the units 100% completed with drywall. Cabinets installation has started on the third and fourth floors.

Tubs are set in 100% of units.

Floors 1,2 3 no trim work started, but trim has started on the 4th floor.

Project is moving with progress being very good.

The project is at the following stages:

Building Permits: proof of inspections and approvals by local officials (done)

Soils & Testing: New reports added to the "other" documents files

Site & Drainage: Status on detention/retention pond: 100%

Site Utilities: Completed

Construction Quality: Very good with production at a fast pace.

Safety on Site: Yes

Progress on Site: 74.31% completed as of this visit 01-29-24

Environmental Conditions: Railroad Track near project but testing found not close enough decibels reached. A copy of the noise contour map previously sent to DCA.

Parking: Parking lot has first coat asphalt but no stripping yet.: 1.0 per senior tenant, HC spaces meet accessibility? Van space?

Vehicle & Pedestrian Circulations: There will be a sidewalk to bus stop to public street.

Open Spaces: N/A

Site Lighting: N/A

Site Amenities: Clubhouse with Community Room, Computer room, Fitness room, Wellness Center, Large Covered Pavilion

Trash Collection: Not completed as of this report: must be screened from residential & community areas, all accessible, concrete slabs aprons 10'.

Signage & Fixtures: N/A

Security: Installed for protection from theft.

Security used during construction and security cameras after completion should be incorporated into architectural design such as fencing, lighting, blind corners, steep grades, inappropriate landscaping.

Building Interior Design Standards:

Room Configurations: Per DCA requirements

Closets: Correct as of 12-18-23. All closets designed to contain clothes must be a min. of 2'-0" deep. All closets must have doors.

Floor Finishes: Not completed as of this report

Luxury Vinyl Tile (LVT) must have a 12mil wear layer and provide a 15-year residential warranty.

LVT installed in kitchens, bathrooms, laundry areas and mechanical closets must be 100% waterproof.

Appliances: Not completed as of this report

Appliances must include microwaves, refrigerators, ranges. (*Note: Dishwashers NOT required in "senior" USDA properties or HUD properties*) Minimum refrigerator sizes for one- and two-bedroom units -"14 cu. Ft. All refrigerators shall have a built in "ice maker". Kitchen appliance must be listed in USEPA's Energy Star program.

Electrical: In progress at 75% as of this report

Electrical switches, outlets, thermostats, phone and television jacks and other controls are to be installed per Fair Housing Act Design Manual requirements in all units and per appropriate accessibility law in accessible units. All penetrations of smoke partitions and rated assemblies must comply with fire codes as administered by the local authorities.

Noise: Report completed on noise control. Noise Contour map previously sent to DCA. *All new construction projects must meet DCA requirements for interior and exterior noise limits. The "DCA and HUD Noise Limitations" are "45 decibels (dB) for interior locations" and "65dB for exterior locations".*

Radon: Completed as of this report

All new construction must be built in accordance with current EPA requirements for radon resistant construction techniques, including, but not limited to, ASTM E1465 – 08a Standard Practice for Radon Control Options for the Design and Construction of New Low- Rise Residential Buildings.

Fire & Safety: In progress as of report 01-29-24

Smoke detectors must be hard-wired and located per code for all construction, either rehabilitation or new.

Carbon Monoxide Detectors shall be in accordance with NFPA 101 Life Safety Code and NFPA 720.

Accessibility:

It is mandatory that the Property be designed to meet all applicable federal, state, local and DCA requirements for accessibility by the disabled. DCA requirements may be more stringent than federal or state requirements.

Newly constructed multi-family housing developments receiving DCA funding are subject to statutory and regulatory accessibility requirements. It is the responsibility of the Owner, Architect, and Contractor to ensure compliance with all federal, state and local laws.

Signage on site: Monument? Amenities? N/A

Asphalt, Curb & Gutter, Landscaping? N/A

Storage trailers on site with materials? Not as of this report

Pavilion or Playground Equipment installed as of this report? N/A

Fire Suppressors in all under all venthoods? Not yet

Laundry facility is in community area? No, in units

II. SITE OBSERVATIONS

Inspection Conditions: 10:00 am, weather: clear, temp. 55*

List personnel met on site: Shane Gillham (Walton)

Trades on site: Plumbers, Electricians, HVAC, Laborers

Progress: 74.31%

Are there any issues with the following:	Y/N (if Y, provide description)
1. industry standards of good workmanship	N
2. substitutions in materials/components	N
3. violations of building or fire and life safety codes (*code compliance is not the legal responsibility of monthly construction consultant; however, obvious violations should be noted)	N
4. plans and specifications	N
5. physical needs assessment and work scope (rehabilitation projects only)	N
6. DCA Application	N
7. DCA Architectural Standards	N
8. DCA Accessibility Standards (*project wide accessibility compliance is not the legal responsibility of monthly construction consultant; however, obvious violations should be noted)	N

III. PROGRESS

Construction start	10-31-22
Construction duration (per contract)	531 days
(+) Days added by change order	0
(=) Revised contract duration	531
(-) Days elapsed	432
(=) Days remaining to contract deadline	99
% of contract time elapsed	81%
DCA deadline (Contractor 05-14-24)	12/31/2024

Buildings (how many)	Start date	Projected completion date	Actual CO date
1 with Community	Framing started 09-26-23 Framing 100% 10-30-23	05-14-24 per CO3	

IV. QUALITY/COMPLIANCE

There were no other discrepancies, deficiencies or problems noted on site today during my inspection.

V. CURRENT COPY OF AIA

The DCA Pay Application has been approved by the "Construction Compliance Inspector" for Draw 14.

Date of Application	01-20-24
AIA #	14

% complete	74.31%
Original Contract Amount	14,494,128.12
Change Orders (*see section XX for descriptions)	388,691.43
Current Contract Amount	14,882,819.55
Work Complete to Date	11,059,811.55
Retainage	970,158.91
Previous Payments	9,047,882.85
Current Amount Due	1,041,769.79
Current Amount Due	1,041,769.79
DCA Construction Contingency	unknown

Change Order #	Date	Description of Work	Amount	Reasonable cost? [y/n]	Days added to schedule
1	3-29-23	Site work changes, Mill 2" asphalt & install 2"topping, credit for MC 3500 chambers underground pond, reduction of secondary drainage budget, storm pipe bedding stone budget reduction	188,353.54	y	0
2	05-20-23	Topsoil haul off, dirt import, unsuitable soils, credit for (22) MC3500 chambers for underground detention pond, credit back from original grading budget, Fee	140,288.40	Y	0
3	10-20-23	Sewer adjustments, change in refrigerator cabinet, water meters, trenching & backfill for Marietta Power, add 29 rain days through 4-30-23, Fee	48,079.50	Y	29 days
4	10-20-23	Marietta Power bore fees	11,970.00	Y	0

Testing

Concrete testing reports reviewed this period? No

Adequate? N/A

Soil testing reviewed this period? No

Adequate? N/A

Other? Erosion Control Reports, Adequate? Yes

Stored Materials:

DCA defines stored materials as those materials that will not be incorporated into the project within 30 days.

Are there materials stored on site that fit the above definition? No

Are funds requested for these materials this period? No

AIA® Document G702® – 1992

Application and Certificate for Payment

TO OWNER: Alexis Parc Senior I LP 3715 Northside Parkway NW Building 200, Suite 175 Atlanta GA 30327	PROJECT: Alexis Parc Senior I LP 341 Roselane Street NW Marietta GA 30060	APPLICATION NO: 014 PERIOD TO: January 20, 2024	Distribution to: OWNER: <input type="checkbox"/> ARCHITECT: <input type="checkbox"/> CONTRACTOR: <input type="checkbox"/> FIELD: <input type="checkbox"/> OTHER: <input type="checkbox"/>
FROM CONTRACTOR: Walton Construction Group LLC 2281 Akers mill road Bldg 4100 Atlanta GA 30339	VIA ARCHITECT: Geheber Lewis & Associates 1325 Logan Circle Atlanta, GA 30318	CONTRACT FOR: General Construction CONTRACT DATE: October 20, 2022 PROJECT NOS: Gheber Lewis Associates / Walton Construction Group / Alexis Parc Senior I, LP	

CONTRACTOR'S APPLICATION FOR PAYMENT

Application is made for payment, as shown below, in connection with the Contract.
AIA Document G703®, Continuation Sheet, is attached.

1. ORIGINAL CONTRACT SUM	\$14,494,128.12
2. NET CHANGE BY CHANGE ORDERS	\$388,691.43
3. CONTRACT SUM TO DATE (Line 1 + 2)	\$14,882,819.55
4. TOTAL COMPLETED & STORED TO DATE (Column G on G703)	\$11,059,811.55
5. RETAINAGE:	
a. 10.00 % of Completed Work (Column D + E on G703)	\$970,158.91
b. 0 % of Stored Material (Column F on G703)	\$0.00
Total Retainage (Lines 5a + 5b or Total in Column I of G703)	\$970,158.91
6. TOTAL EARNED LESS RETAINAGE	\$10,089,652.64
(Line 4 Less Line 5 Total)	
7. LESS PREVIOUS CERTIFICATES FOR PAYMENT	\$9,047,882.85
(Line 6 from prior Certificate)	
8. CURRENT PAYMENT DUE	\$1,041,769.79
9. BALANCE TO FINISH, INCLUDING RETAINAGE (Line 3 less Line 6)	\$4,793,166.91

CHANGE ORDER SUMMARY	ADDITIONS	DEDUCTIONS
Total changes approved in previous months by Owner	\$388,691.43	\$0.00
Total approved this Month	\$0.00	\$0.00
TOTALS	\$388,691.43	\$0.00
NET CHANGES by Change Order		\$388,691.43

The undersigned Contractor certifies that to the best of the Contractor's knowledge, information and belief the Work covered by this Application for Payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments received from the Owner, and that current payment shown herein is now due.

CONTRACTOR:

By: _____

State of: Georgia

County of: DeKalb

Subscribed and sworn to before
me this 19th day of January

Notary Public: Jennifer Waters

My Commission expires: 11/28/2027



ARCHITECT'S CERTIFICATE FOR PAYMENT

In accordance with the Contract Documents, based on on-site observations and the data comprising this application, the Architect certifies to the Owner that to the best of the Architect's knowledge, information and belief the Work has progressed as indicated, the quality of the Work is in accordance with the Contract Documents, and the Contractor is entitled to payment of the AMOUNT CERTIFIED.

AMOUNT CERTIFIED \$1,041,769.79

(Attach explanation if amount certified differs from the amount applied. Initial all figures on this Application and on the Continuation Sheet that are changed to conform with the amount certified.)

ARCHITECT: Rui L

By: _____

Date: 01/25/2024

This Certificate is not negotiable. The AMOUNT CERTIFIED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner or Contractor under this Contract.

containing Contractor's signed Certification, is attached.

In Tabulations below, amounts are stated to the nearest dollar.

Use Column 1 on Contracts Where variable retainage for line items may apply.

Exhibit D
Alexis Parc, Senior 1 LP
Draw Request

APPLICATION NO : 14

APPLICATION DATE : 01/20/24

PERIOD TO : 01/20/24

	B	C	D	D	E	F	G	H	I	J	K	L	M	N		
No.	Description of work	Original Budget	Internal Revisions	Change Orders	Revised Budget (C+D+E)	Variance To Original Budget (C-F)	Prior Period Draws	Current Period Draw	Job to Date Draws	Balance Remaining to Draw	Percent Complete	Previous Retainage Held	Current Retainage Held at 10%	Total Retainage Held	Retainage Released	Retainage on Hand
Sitework																
	Clearing + Grubbing / Demo	25,496.57		—	25,496.57	—	25,496.57	—	25,496.57	—	100.00%	2,549.66	—	2,549.66		2,549.66
	Grading Contract	309,386.50		12,551.00	321,937.50	(12,551.00)	315,498.75		315,498.75	6,438.75	98.00%	31,549.88		31,549.88		31,549.88
	Unsuitable Soils	25,000.00	—	123,060.00	148,060.00	(123,060.00)	148,060.00		148,060.00		100.00%	14,806.00	—	14,806.00		14,806.00
	Soil Compaction Test	—		—	—	—	—	—	—	—	—	—	—	—		—
	Site Layout - Staking	25,000.00			25,000.00		22,500.00		22,500.00	2,500.00	90.00%	2,250.00		2,250.00		2,250.00
	Erosion Control	52,395.00		29,757.50	82,152.50	(29,757.50)	82,152.50		82,152.50		100.00%	8,215.25	—	8,215.25		8,215.25
	Erosion Control Maintenance	10,000.00		—	10,000.00		4,000.00		4,000.00	6,000.00	40.00%	400.00	—	400.00		400.00
	Fine Grading / Topsoil Respread	—		—	—	—	—	—	—	—	—	—	—	—		—
	Termite Protection	15,477.92			15,477.92	—	14,704.02		14,704.02	773.90	95.00%	1,470.40	—	1,470.40		1,470.40
	Storm Sewer	552,474.50		46,658.50	599,133.00	(46,658.50)	599,133.00		599,133.00	—	100.00%	59,913.30	—	59,913.30		59,913.30
	Headwall for 84"				—	—	—	—	—	—	—	—	—	—		—
	Secondary Drainage	42,724.00		(30,000.00)	12,724.00	30,000.00	12,087.80		12,087.80	636.20	95.00%	1,208.78	—	1,208.78		1,208.78
	Sanitary Sewer	98,245.00			211,958.50	(113,713.50)	211,958.50	—	211,958.50		100.00%	21,195.85	—	21,195.85		21,195.85
	Water System	131,970.00		(7,080.00)	124,890.00	7,080.00	124,890.00		124,890.00	—	100.00%	12,489.00	—	12,489.00		12,489.00
	Site Walls - Modular	365,205.28		3,387.90	368,593.18	(3,387.90)	368,593.18		368,593.18	—	100.00%	36,859.32	—	36,859.32		36,859.32
	Curbing	50,876.85		—	50,876.85	—	48,333.01		48,333.01	2,543.84	95.00%	4,833.30	—	4,833.30		4,833.30
	Site Concrete - Sidewalks + Pads	116,990.75			116,990.75		17,548.61		17,548.61	99,442.14	15.00%	1,754.86	—	1,754.86		1,754.86
	Asphalt Paving	137,282.50		20,629.00	157,911.50	(20,629.00)	134,224.78	—	134,224.78	23,686.73	85.00%	13,422.48	—	13,422.48		13,422.48
	Pervious Pavers	96,000.00		—	96,000.00	—	72,000.00		72,000.00	24,000.00	75.00%	7,200.00	—	7,200.00		7,200.00
	Sleeving	10,000.00		—	10,000.00	—	10,000.00	—	10,000.00	—	100.00%	1,000.00	—	1,000.00		1,000.00
	Striping	15,000.00		—	15,000.00	—	—	—	—	15,000.00	—	—	—	—		—
	Electric Service - Street Lights	—		—	—	—	—	—	—	—	—	—	—	—		—
	Landscaping - Allowance	162,515.00		—	162,515.00	—	40,628.75		40,628.75	121,886.25	25.00%	4,062.88	—	4,062.88		4,062.88
	Irrigation - Allowance	30,000.00		—	30,000.00	—	1,500.00	—	1,500.00	28,500.00	5.00%	150.00	—	150.00		150.00
	Covered Porch - Allowance	20,000.00		—	20,000.00	—	—	—	—	20,000.00	—	—	—	—		—
	Playground - Allowance	—		—	—	—	—	—	—	—	—	—	—	—		—
	Misc.	—		—	—	—	—	—	—	—	—	—	—	—		—
	Total Sitework	2,292,039.87	—	312,677.40	2,604,717.27	(312,677.40)	2,253,309.47	—	2,253,309.47	351,407.80	86.51%	225,330.95	—	225,330.95	—	225,330.95
Concrete Work																
	Foundation Walls			—	—	—	—	—	—	—	—	—	—	—		—
	Concrete - Slab on Grade	325,809.60		—	325,809.60	—	325,809.60		325,809.60	—	100.00%	32,580.96	—	32,580.96		32,580.96
	Interior Gypcrete / Lightweight	137,983.50		—	137,983.50	—	20,697.53	34,495.88	55,193.40	82,790.10	40.00%	5,519.34	3,449.59	5,519.34		5,519.34
	Corridor Flooring	62,318.72		—	62,318.72	—	—	—	—	62,318.72	—	—	—	—		—
	Total Concrete Work	526,111.82	—	—	526,111.82	—	346,507.13	34,495.88	381,003.00	145,108.82	72.42%	34,650.71	3,449.59	38,100.30	—	38,100.30
Masonry																
	Brick Veneer	333,617.00		—	333,617.00	—	333,617.00	—	333,617.00	—	100.00%	33,361.70	—	33,361.70		33,361.70
	Caulking + Sealants	35,000.00		—	35,000.00	—	—	—	—	35,000.00	—	—	—	—		—
	CMU Elevator Shaft	53,251.00		—	53,251.00	—	53,251.00	—	53,251.00	—	100.00%	5,325.10	—	5,325.10		5,325.10
	Total Masonry	421,868.00	—	—	421,868.00	—	386,868.00	—	386,868.00	35,000.00	91.70%	38,686.80	—	38,686.80	—	38,686.80
Steel																
	Building Stairs + Rail	65,500.00		—	65,500.00	—	62,225.00	—	62,225.00	3,275.00	95.00%	6,222.50	—	6,222.50		6,222.50
	Steel Shutters/Canopies	45,613.75		—	45,613.75	—	—	—	—	45,613.75	—	—	—	—		—
	Structural Steel	54,000.00		—	54,000.00	—	54,000.00	—	54,000.00	—	100.00%	5,400.00	—	5,400.00		5,400.00
	Site Rails	77,950.00		—	77,950.00	—	35,077.50	—	35,077.50	42,872.50	45.00%	3,507.75	—	3,507.75		3,507.75
	Attic Hatches	5,000.00		—	5,000.00	—	5,000.00	—	5,000.00	—	100.00%	500.00	—	500.00		500.00
	Total Steel	248,063.75	—	—	248,063.75	—	156,302.50	—	156,302.50	91,761.25	63.01%	15,630.25	—	15,630.25	—	15,630.25
Wood & Plastics																
	Framing Labor	719,000.00		—	719,000.00	—	719,000.00	—	719,000.00	—	100.00%	71,900.00	—	71,900.00		71,900.00
	Framing Material - P.O.	831,946.38	—	—	831,946.38	—	831,946.38	—	831,946.38	—	100.00%	83,194.64	—	83,194.64		83,194.64
	Framing Accessories Material	42,230.00		—	42,230.00	—	42,230.00	—	42,230.00	—	100.00%	4,223.00	—	4,223.00		4,223.00
	Punchout Material	50,000.00		—	50,000.00	—	2,500.00	7,500.00	10,000.00	40,000.00	20.00%	250.00	750.00	1,000.00		1,000.00
	Punchout Labor	85,000.00		—	85,000.00	—	12,750.00	12,750.00	25,500.00	59,500.00	30.00%	1,275.00	1,275.00	2,550.00		2,550.00
	Trash Removal	71,875.00		—	71,875.00	—	43,125.00	10,781.25	53,906.25	17,968.75	75.00%	4,312.50	1,078.13	5,390.63		5,390.63
	Trash Chute	30,516.00		—	30,516.00	—	15,258.00	7,629.00	22,887.00	7,629.00	75.00%	1,525.80	762.90	2,288.70		2,288.70
	Security Service	75,000.00		—	75,000.00	—	56,250.00	3,750.00	60,000.00	15,000.00	80.00%	5,625.00	375.00	6,000.00		6,000.00
	Construction Monitoring/Security	40,000.00		—	40,000.00	—	—	—	—	40,000.00	—	—	—	—		—
	Floor - Trusses	369,884.00		—	369,884.00	—	369,884.00	—	369,884.00	—	100.00%	36,988.40	—	36,988.40		36,988.40
	Roof - Trusses	188,100.00		—	188,100.00	—	188,100.00	—	188,100.00	—	100.00%	18,810.00	—	18,810.00		18,810.00
	Siding - Labor + Material	488,800.00		—	488,800.00	—	366,600.00	122,200.00	488,800.00	—	100.00%	36,660.00	12,220.00	48,880.00		48,880.00
	Decks & Railings			—	—	—	—	—	—	—	—	—	—	—		—
	Fire Caulking + Sealants	20,000.00		—	20,000.00	—	16,000.00	—	16,000.00	4,000.00	80.00%	1,600.00	—	1,600.00		1,600.00
	Interior Trim Labor	79,420.00		—	79,420.00	—	—	19,855.00	19,855.00	59,565.00	25.00%	—	1,985.50	1,985.50		1,985.50
	Interior Trim Material	85,410.00		—	85,410.00	—	—	21,352.50	21,352.50	64,057.50	25.00%	—	2,135.25	2,135.25		2,135.25
	Window Tape	12,500.00		—	12,500.00	—	12,500.00	—	12,500.00	—	100.00%	1,250.00	—	1,250.00		1,250.00
	Equipment / Maintenance	25,000.00		—	25,000.00	—	—	—	—	25,000.00	—	—	—	—		—
	Wire Shelving	23,076.00		—	23,076.00	—	—	—	—	23,076.00	—	—	—	—		—
	Total Wood & Plastics	3,237,757.38	—	—	3,237,757.38	—	2,676,143.38	205,617.75	2,881,961.13	355,796.25	89.01%	267,614.34	20,581.78	288,196.11	—	288,196.11

AIA Document G703, APPLICATION AND CERTIFICATE FOR PAYMENT,
containing Contractor's signed Certification, is attached.

In Tabulations below, amounts are stated to the nearest dollar.

Use Column 1 on Contracts Where variable retainage for line items may apply.

Exhibit D
Alexis Parc, Senior 1 LP
Draw Request

APPLICATION NO : 14

APPLICATION DATE : 01/20/24

PERIOD TO : 01/20/24

A	B	C	D	D	E	F	G	H	I	J	K			L	M	N
No.	Description of work	Original Budget	Internal Revisions	Change Orders	Revised Budget (C+D+E)	Variance To Original Budget (C-F)	Prior Period Draws	Current Period Draw	Job to Date Draws	Balance Remaining to Draw	Percent Complete	Previous Retainage Held	Current Retainage Held at 10%	Total Retainage Held	Retainage Released	Retainage on Hand
	Waterproofing	432.00		–	432.00	–	432.00	–	432.00	–	100.00%	43.20	–	43.20		43.20
	Lumber Spray Treatment and Testing	12,170.00		–	12,170.00	–	9,736.00	–	9,736.00	2,434.00	80.00%	973.60	–	973.60		973.60
	Insulation	121,380.00		–	121,380.00	–	91,035.00	–	91,035.00	30,345.00	75.00%	9,103.50	–	9,103.50		9,103.50
	Roofing - Shingles	138,400.00		–	138,400.00	–	131,480.00	6,920.00	138,400.00	–	100.00%	13,148.00	692.00	13,840.00		13,840.00
	Gutters	37,700.00		–	37,700.00	–	–	–	–	37,700.00		–	–	–		–
	Total Waterproofing & Insulation	310,082.00	–	–	310,082.00	–	232,683.00	6,920.00	239,603.00	70,479.00	77.27%	23,268.30	692.00	23,960.30	–	23,960.30
Doors & Windows																
	Interior Doors	132,627.00		–	132,627.00	–	–	33,156.75	33,156.75	99,470.25	25.00%	–	3,315.68	3,315.68		3,315.68
	Exterior Doors	30,104.00		–	30,104.00	–	3,010.40	3,010.40	6,020.80	24,083.20	20.00%	301.04	301.04	602.08		602.08
	Finish Hardware	20,666.00		–	20,666.00	–	–	–	–	20,666.00		–	–	–		–
	Corridor Trim, Doors + Hardware	127,527.00		–	127,527.00	–	–	31,881.75	31,881.75	95,645.25	25.00%	–	3,188.18	3,188.18		3,188.18
	Windows - Materials	111,800.27		–	111,800.27	–	111,800.27	–	111,800.27	–	100.00%	11,180.03	–	11,180.03		11,180.03
	Windows - Labor			–	–	–	–	–	–	–		–	–	–		–
	Windows - Storefront	107,042.27		–	107,042.27	–	2,140.85	–	2,140.85	104,901.42	2.00%	214.08	–	214.08		214.08
	Garages			–	–	–	–	–	–	–		–	–	–		–
	Fire Glass			–	–	–	–	–	–	–		–	–	–		–
	Total Doors & Windows	529,766.54	–	–	529,766.54	–	116,951.52	68,048.90	185,000.42	344,766.12	34.92%	11,695.15	6,804.89	18,500.04	–	18,500.04
Finishes																
	Drywall	752,887.50		–	752,887.50	–	376,443.75	376,443.75	752,887.50	–	100.00%	37,644.38	37,644.38	75,288.75		75,288.75
	Paint	247,344.90		–	247,344.90	–	–	61,836.23	61,836.23	185,508.68	25.00%	–	6,183.62	6,183.62		6,183.62
	Pressure Wash	25,000.00		–	25,000.00	–	–	–	–	25,000.00		–	–	–		–
	Ceramic Tile	49,780.00		–	49,780.00	–	–	–	–	49,780.00		–	–	–		–
	Vinyl Flooring	135,363.90		–	135,363.90	–	–	–	–	135,363.90		–	–	–		–
	Carpet	32,743.16		–	32,743.16	–	–	–	–	32,743.16		–	–	–		–
	Final Clean	40,000.00		–	40,000.00	–	–	–	–	40,000.00		–	–	–		–
	Total Finishes	1,283,119.46	–	–	1,283,119.46	–	376,443.75	438,279.98	814,723.73	468,395.74	63.50%	37,644.38	43,828.00	81,472.37	–	81,472.37

containing Contractor's signed Certification, is attached.

In Tabulations below, amounts are stated to the nearest dollar.

Use Column 1 on Contracts Where variable retainage for line items may apply.

Exhibit D
Alexis Parc, Senior 1 LP
Draw Request

APPLICATION NO : 14

APPLICATION DATE : 01/20/24

PERIOD TO : 01/20/24

A	B	C	D	D	E	F	G	H	I	J	K			L	M	N
No.	Description of work	Original Budget	Internal Revisions	Change Orders	Revised Budget (C+D+E)	Variance To Original Budget (C-F)	Prior Period Draws	Current Period Draw	Job to Date Draws	Balance Remaining to Draw	Percent Complete	Previous Retainage Held	Current Retainage Held at 10%	Total Retainage Held	Retainage Released	Retainage on Hand
Special Conditions																
	Grab Bars		--	--	--	--	--	--	--	--	--	--	--	--	--	--
	Fire Extinguishers	8,000.00		--	8,000.00	--	--	--	--	8,000.00		--	--	--	--	--
	Stovetop Fire Suppression	5,075.00		--	5,075.00	--	--	--	--	5,075.00		--	--	--	--	--
	Bathroom Accessories	9,344.00		--	9,344.00	--	--	--	--	9,344.00		--	--	--	--	--
	Shower Doors			--	--	--	--	--	--	--		--	--	--	--	--
	Mirrors	27,745.00		--	27,745.00	--	--	--	--	27,745.00		--	--	--	--	--
	Signage + Directionals - Allowance			--	--	--	--	--	--	--		--	--	--	--	--
	Leasing Office	125,000.00		--	125,000.00	--	62,500.00	31,250.00	93,750.00	31,250.00	75.00%	6,250.00	3,125.00	9,375.00		9,375.00
	Sitting Rooms - Allowance	15,000.00		--	15,000.00	--	--	--	--	15,000.00		--	--	--	--	--
	Mail House	10,498.24		--	10,498.24	--	10,498.24	--	10,498.24	--	100.00%	1,049.82	--	1,049.82		1,049.82
	Package Concierge - Allowance	10,000.00		--	10,000.00	--	--	--	--	10,000.00		--	--	--	--	--
	Access Control / Gates - Allowance			--	--	--	--	--	--	--		--	--	--	--	--
	Total Special Conditions	210,662.24	--	--	210,662.24	--	72,998.24	31,250.00	104,248.24	106,414.00	49.49%	7,299.82	3,125.00	10,424.82	--	10,424.82
Equipment																
	Kitchen Appliances	167,666.56		--	167,666.56	--	--	--	--	167,666.56	--	--	--	--	--	--
	Cabinetry and Countertops	387,374.19		11,900.00	399,274.19	(11,900.00)	27,949.19	71,869.35	99,818.55	299,455.64	25.00%	2,794.92	7,186.94	9,981.85		9,981.85
	Total Equipment	555,040.75	--	11,900.00	566,940.75	(11,900.00)	27,949.19	71,869.35	99,818.55	467,122.20	17.61%	2,794.92	7,186.94	9,981.85	--	9,981.85
Window Treatments (Furnishings in Soft Costs)																
	Window Treatments	26,522.00		--	26,522.00	--	--	--	--	26,522.00	--	--	--	--	--	--
	Total Window Treatments	26,522.00	--	--	26,522.00	--	--	--	--	26,522.00	--	--	--	--	--	--
Special Construction																
	ADA Misc	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
	Fire Sprinkler System	195,000.00		--	195,000.00	--	146,250.00	--	146,250.00	48,750.00	75.00%	14,625.00	--	14,625.00		14,625.00
	Fire Alarm	100,188.63		--	100,188.63	--	50,094.32	25,047.16	75,141.47	25,047.16	75.00%	5,009.43	2,504.72	7,514.15		7,514.15
	Energy / Sustainable Items	15,000.00		--	15,000.00	--	--	--	--	15,000.00		--	--	--	--	--
	Elevator	129,530.00		--	129,530.00	--	63,469.70	--	63,469.70	66,060.30	49.00%	6,346.97	--	6,346.97		6,346.97
	Radon System	31,420.00		--	31,420.00	--	30,163.20	--	30,163.20	1,256.80	96.00%	3,016.32	--	3,016.32		3,016.32
	Total Special Construction	471,138.63	--	--	471,138.63	--	289,977.22	25,047.16	315,024.37	156,114.26	66.86%	28,997.72	2,504.72	31,502.44	--	31,502.44
Mechanical																
	Plumbing	753,702.95		--	753,702.95	--	527,592.07	37,685.15	565,277.21	188,425.74	75.00%	52,759.21	3,768.51	56,527.72		56,527.72
	Apt. Unit Water Metering	13,680.00		(3,116.00)	10,564.00	3,116.00	5,282.00	--	5,282.00	5,282.00	50.00%	528.20	--	528.20		528.20
	HVAC	838,271.68		--	838,271.68	--	628,703.76	--	628,703.76	209,567.92	75.00%	62,870.38	--	62,870.38		62,870.38
	Total Mechanical	1,605,654.63	--	(3,116.00)	1,602,538.63	3,116.00	1,161,577.83	37,685.15	1,199,262.97	403,275.66	74.84%	116,157.78	3,768.51	119,926.30	--	119,926.30
Electrical																
	Electrical	761,431.50		19,496.00	780,927.50	(19,496.00)	507,602.88	78,092.75	585,695.63	195,231.88	75.00%	50,760.29	7,809.28	58,569.56		58,569.56
	Electrical Fixtures - Lighting	102,906.28		--	102,906.28	--	--	--	--	102,906.28	--	--	--	--	--	--
	Radio transmitters	31,784.87		--	31,784.87	--	31,784.87	--	31,784.87	--	100.00%	3,178.49	--	3,178.49		3,178.49
	Prewire TV/Low voltage	83,896.25		--	83,896.25	--	58,727.38	4,194.81	62,922.19	20,974.06	75.00%	5,872.74	419.48	6,292.22		6,292.22
	Lightning Protection - Allowance	10,500.00		--	10,500.00	--	--	--	--	10,500.00		--	--	--	--	--
	Emergency Pulls	5,801.50		--	5,801.50	--	4,061.05	--	4,061.05	1,740.45	70.00%	406.11	--	406.11		406.11
	Total Electrical	996,320.40	--	19,496.00	1,015,816.40	(19,496.00)	602,176.17	82,287.56	684,463.73	331,352.67	67.38%	60,217.62	8,228.76	68,446.37	--	68,446.37
Total Structural & Land Improvements		12,714,147.47	--	340,957.40	13,055,104.87	(340,957.40)	8,699,887.38	1,001,701.72	9,701,589.10	3,353,515.77	74.31%	869,988.74	100,170.17	970,158.91	--	970,158.91
General Requirements																
	Field Personnel and Expense	553,848.85		20,457.44	574,306.29	(20,457.44)	382,716.19	44,065.80	426,781.99	147,524.30	74.31%	--	--	--	--	--
	Temporary Office	25,000.00	--	--	25,000.00	--	16,659.93	1,918.22	18,578.15	6,421.85	74.31%	--	--	--	--	--
	Temporary Phone	2,000.00	--	--	2,000.00	--	1,332.79	153.46	1,486.25	513.75	74.31%	--	--	--	--	--
	Temporary Water	5,000.00	--	--	5,000.00	--	3,331.99	383.64	3,715.63	1,284.37	74.31%	--	--	--	--	--
	Temporary Electricity	12,000.00	--	--	12,000.00	--	7,996.77	920.74	8,917.51	3,082.49	74.31%	--	--	--	--	--
	Mobilization	10,000.00	--	--	10,000.00	--	6,663.97	767.29	7,431.26	2,568.74	74.31%	--	--	--	--	--
	Temporary Road	17,500.00	--	--	17,500.00	--	11,661.95	1,342.75	13,004.71	4,495.29	74.31%	--	--	--	--	--
	Temporary Toilets	20,000.00	--	--	20,000.00	--	13,327.95	1,534.57	14,862.52	5,137.48	74.31%	--	--	--	--	--
	Temp. Signage	5,000.00	--	--	5,000.00	--	3,331.99	383.64	3,715.63	1,284.37	74.31%	--	--	--	--	--
	Postage / Plans	3,000.00	--	--	3,000.00	--	1,999.19	230.19	2,229.38	770.62	74.31%	--	--	--	--	--
	Temp. Fencing	18,000.00	--	--	18,000.00	--	11,995.15	1,381.12	13,376.27	4,623.73	74.31%	--	--	--	--	--
	Aerial Photographs	1,500.00	--	--	1,500.00	--	999.60	115.09	1,114.69	385.31	74.31%	--	--	--	--	--
	General Liability Insurance	70,000.00	--	--	70,000.00	--	46,647.82	5,371.01	52,018.83	17,981.17	74.31%	--	--	--	--	--
	Warranty	10,000.00	--	--	10,000.00	--	6,663.97	767.29	7,431.26	2,568.74	74.31%	--	--	--	--	--
	Safety Program	10,000.00	--	--	10,000.00	--	6,663.97	767.29	7,431.26	2,568.74	74.31%	--	--	--	--	--
	Total General Requirements	762,848.85	--	20,457.44	783,306.29	(20,457.44)	521,993.21	60,102.10	582,095.31	201,210.95	74.31%	--	--	--	--	--
Contractor's Fees																
	Contractor's Overhead	254,282.95		6,819.15	261,102.10	(6,819.15)	173,997.75	20,034.03	194,031.78	67,070.32	74.31%	--	--	--	--	--
	Contractor's Profit	762,848.85		20,457.44	783,306.29	(20,457.44)	521,993.24	60,102.10	582,095.35	201,210.95	74.31%	--	--	--	--	--
	Total Builder Overhead	1,017,131.80	--	27,276.59	1,044,408.39	(27,276.59)	695,990.99	80,136.14	776,127.13	268,281.26	74.31%	--	--	--	--	--

AIA Document G703, APPLICATION AND CERTIFICATE FOR PAYMENT,
containing Contractor's signed Certification, is attached.

In Tabulations below, amounts are stated to the nearest dollar.

Use Column 1 on Contracts Where variable retainage for line items may apply.

Exhibit D
Alexis Parc, Senior 1 LP
Draw Request

APPLICATION NO : 14

APPLICATION DATE : 01/20/24

PERIOD TO : 01/20/24

A	B	C	D	D	E	F	G	H	I	J	K			L	M	N
No.	Description of work	Original Budget	Internal Revisions	Change Orders	Revised Budget (C+D+E)	Variance To Original Budget (C-F)	Prior Period Draws	Current Period Draw	Job to Date Draws	Balance Remaining to Draw	Percent Complete	Previous Retainage Held	Current Retainage Held at 10%	Total Retainage Held	Retainage Released	Retainage on Hand
	TOTAL	14,494,128.12	-	388,691.43	14,882,819.55	(388,691.43)	9,917,871.59	1,141,939.96	11,059,811.55	3,823,007.97	74.31%	869,988.74	100,170.17	970,158.91	-	970,158.91



1: Building Exterior



2: Building Exterior



3: Building Interior



4: Unit 1419



5: Unit 1419



6: Unit 1419



7: Unit 1419



8: Unit 1419



9: Unit 1316



10: Unit 1316



11: Unit 1316



12: Unit 1316



13: Unit 1316



14: Unit 1316



15: Community Room



16: Elevator

Email Distribution List for Alexis Parc

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Appendix E

DCA Accessibility Consultant Qualifications Package Checklist

The Qualification Package must be and contain the following information in the order shown and numbered as follows (please scan each document separately):

- Cover Letter: A cover letter which provides the company name, mailing address; contact name, telephone number, and email address of the individual to whom DCA may communicate regarding the Qualifications Package.
- References: Three current customer references for accessibility reviews must be included. Of special interest to DCA are any customer references from multi-family housing developers, state or local housing agencies and/or financial institutions. Please provide the customer reference contact person's name and telephone number;
- Resumes: Copies of resumes for all proposed individuals who will be working directly on the inspections if the Consultant is qualified (Resumes should include any and all trainings and certifications related to accessibility);
- Report Samples: At least two samples of accessibility reports (one for new construction, one for substantial rehabilitation) that your firm recently completed for a multi-family housing development. (Consultants currently qualified by DCA to perform accessibility inspections and in good standing need not submit sample reports);
- Project List: A listing of multi-family rental housing projects on which Consultant has performed accessibility reviews. This listing should indicate the project name, number of units, proposed tenancy (senior, family or 'other'), source of financing and whether the project was assisted with government funding.
- Qualifications Statement: Executed Copy of the DCA Accessibility Consultant Qualifications Statement.
- Scope and Reporting Standards: Executed Copy of the DCA Certification of Minimum Scope and Reporting Standards.

Certification Statement: (Place X next to statement that applies)

☒ Certifies that all items listed above are included in the Qualifications Package and are deemed to comply with the stated requirements listed above and in the DCA Accessibility Consultant Qualifications Statement:

OR

☐ Certifies that there have been no changes to a previously submitted Qualifications Package or to company structure within the last 6 months. The associated project number/name is as follows: _____

Company Name: Financial Field Services, LLC

Contact Name: Angela Averitt

Signature: *Angela Averitt*

Phone: 706-718-4444

Date: 02/19/2024

Appendix G

DCA Certification of Minimum Scope and Reporting Standards

The Accessibility Consultant will perform tasks necessary to review and report LIHTC and/or other DCA federally funded properties for compliance with federal, state, and agency accessibility laws and requirements, including, but not limited to:

- Title II and III of the Americans with Disabilities Act and all applicable compliance standards.
- Section 504 of the Rehabilitation Act of 1973 and all applicable compliance standards.
- The Fair Housing Act and all applicable compliance standards.
- The Georgia Access Law (O.C.G.A. §30-3 et. seq.) and all applicable compliance standards.
- Georgia Fair Housing Law (O.C.G.A. §8-3-200 et. seq.) and all applicable compliance standards.
- The requirements of the DCA Qualified Allocation Plan (QAP) applicable to the Project and the DCA Accessibility Manual.
- Any other accessibility laws and regulations applicable to the project.

The following identifies the minimum DCA accessibility work scope and reporting standards:

Plans and Specification Review Report

Scope: A pre-construction plan and specification review to determine that the proposed construction documents will meet all accessibility requirements.

Reporting: Include the following minimum standards in the report:

- Identify all applicable federal, state, and agency accessibility laws and requirements.
- Include the documents reviewed.
- The review comments from the Consultant, all documents related to resolution of identified accessibility issues.
- Certification from the Consultant that the plan/spec review comments have been incorporated in the construction documents.

Framing Inspection (and additional needed interim inspections) Report

Scope: An inspection of the construction site after framing is completed to determine that the property is following the approved plans and specifications as to accessibility.

Reporting: Include the following minimum standards in the report:

- Identify all applicable federal, state, and agency accessibility laws and requirements.
- Description of the general progress of construction activities.
- Description of the level of compliance with accessibility achieved to date.
- Details on all areas of inconsistencies, including areas where the project is out of compliance with federal and state laws and regulations.
- Recommendations that would bring the project in compliance with accessibility regulations.
- Photographs representative of situations that must be addressed.

Final Inspection Report

Scope: A final inspection of the property after completion of construction to determine that the property has been constructed in accordance with all accessibility requirements. This will include inspection of:

- All units designated equipped for the mobility impaired (5% of the project unit count).
- All units designated equipped for the audio/visual impaired (2% of the project unit count).
- Where applicable, a random sample of 5% of the units required to comply with the Federal Fair Housing Amendments Act.
- Overall review of the site for accessibility.

Reporting: Include the following minimum standards in the report:

- Identify all applicable federal, state, and agency accessibility laws and requirements.
- Information outlined in the Appendix I DCA Final Accessibility Inspection Checklist.
- Details on all areas of inconsistencies, including areas where the project is out of compliance with federal and state laws and regulations
- Recommendations that would bring the project in compliance with DCA, state, federal and industry standards
- Photographs representative of situations that must be addressed

Certificate of Accessibility Compliance

Scope: Following the final report after the general contractor and/or developer has had a reasonable opportunity to correct deficiencies, the Qualified Consultant will confirm that the corrections were executed properly.

Reporting: DCA Consultant Accessibility Certification.

NOTE: It is incumbent upon the Qualified Consultant to arrange enough visits with his client, the LIHTC Developer, to observe all areas of accessibility and to verify completion of recommended corrections.

Certification Statement: Consultant agrees to comply with all requirements as stated above.

Company Name: Financial Field Services, LLC

Consultant Name: Angela Averitt Phone: 706-718-4444

Signature:  Date: 02/19/2024

Note: Executed copy to be included with each report.

Closed out these 16 HUD Projects in 2022 that require my review of all required construction items to include the accessibility requirements shown on the plans and specs for these projects:

Arbours at Covington (5 buildings & club, 180 units, New)
Capstone Kinsey Cove (50 buildings, 212 units, Rehab)
City Light IIA (1 building, 90 units, New)
Eastgate Apartments (10 buildings 96 units, Rhab)
Farview Apartments (15 buildings 100 units, Rhab)
London Townhomes (32 buildings 200 units, Rhab)
Swallowtail Flats (6 buildings & club, 126 units, New)
Sycamore Ridge (7 buildings 220 units, Rhab)
Sylvan Hills Senior (1 building & club, 183 units, New)
Evergreen (5 buildings & club, 260 units, New)
Grant Landing (7 buildings & club, 96 units, New)
Green Meadows (9 buildings 120 units, Rhab)
Hollywood Shawnee (14 buildings 112 units, Rhab)
Parc Opelika (7 buildings & club, 168 units, New)
Sandy Springs (17 buildings 74 units, Rhab)
Walton Fayetteville (7 buildings & club, 270 units, New)

Closed Out these HUD projects in 2020.

White Circle III (New construction, 1 building, 108 units)
Tupelo Ridge (New construction, 4 buildings, 92 units)
Renaissance at Garden Walk (New construction, 2 buildings, 160 units)
Peaks at Oakwood (New construction, 4 buildings, 84 units)
Madison Heights II (New construction, 6 buildings, 120 units)
Noble Vines (New construction, 12 buildings, 276 units)
Creeside Adamsville (New construction, 4 buildings, 147 units)
Forest View (New construction, 11 buildings, 283 units)
Hillcrest Senior (New construction, 4 buildings, 180 units)
Bethel Towers (High Rise Rehab of 180 units with 16 floors)
Centennial Phase 4 (Rehab of 22 buildings with 195 units)
SLX Chamblee (High Rise new construction, \$60 million project, 1 building 7 stories, 311 units)
Chattahoochee Walton (New construction, 1 building, 26 units)
Villages of Castleberry (Rehab, 11 buildings, 166 units)
Sterling Candler (New construction, 2 buildings, 170 units)
City Lights II (New construction, 1 building, 96 units)
Pier Park (New construction, 10 buildings, 240 units)

Present HUD Projects as of March 2023

Dogwood Sylvester GA.
Dogwood Warwick, GA.
Jewish Tower
Walton Fayetteville

Monthly DCA Projects as of January 2022:

Quest Commons (New construction, 1 high rise building, 59 units)
Peachtree Senior Tower/ Davis Bacon (Rehab, 1 building, 196 units)
Nine Oaks/ Fairmont/ Davis Bacon
Thrive Sweet Auburn

Residents Newnan Crossing

Current DCA 2023

Highland Terrace OPEN

Murphy Homes OPEN

Mallory OPEN

West Point OPEN

Elm Street OPEN

50% & 100% DCA Inspection Projects as of January 2022:

Freedom Heights

Timberfalls

Northwinds Place

White Circle II

Centennial IV

Wood Valley

Heritage Family

Swanton Heights

Highlands at Kayne

Hunters Run

Grove Park

McEachern Village

Perkins Field

Magnolia Terrace

Walton Reserve

Valley Hill Senior

Parkside Quarry Yards

Forsyth gardens

Meredith Park

Villas Mt Zion

Flats at Mt Zion

True Light Haven

Heritage Family

Swanton Heights

Harper Woods

Mill Village

Hartland Station

Eastgate Apts.

Haven South

The Phoenix

Vining's Senior

Perkins Field

Park Trace

Intrada Westside

Grove Park

Reserve at Bolton Road

Currently as of February 2024 I have 10 HUD Projects, 25 Accessibility Projects, 22 DCA Monthly Projects that require my review of all required construction items to include the accessibility requirements shown on the plans and specs for these projects:

Update 2024:

Sweetwater Point (new construction mid-rise 90 units)

Jewish Tower (Rehab 2 buildings 260 units)

Dogwood Sylvester & Warwick (7 projects with Housing Authority, 73 buildings, 188 units)

Boulevard North (new construction 1 building, 88 units)

2020: Bethel Towers (High Rise Rehab of 180 units with 16 floors)

Centennial Phase 4 (Rehab of 22 buildings with 195 units)

SLX Chamblee (High Rise new construction, \$60 million project, 1 building 7 stories, 311 units)

Chattahoochee Walton (New construction, 1 building, 26 units)

Columbia Fayetteville (New construction, 5 buildings, 160 units)

Columbia Scott Blvd. (High Rise 1 building, 90 units)

Creeside Adamsville (New construction, 4 buildings, 147 units)

Forest View (New construction, 11 buildings, 283 units)

Hillcrest Senior (New construction, 4 buildings, 180 units)

Latitude at Hammock Bay (New construction, 11 buildings, 232 units)

Madison Heights II (New construction, 6 buildings, 120 units)

Noble Vines (New construction, 12 buildings, 276 units)

Peaks at Oakwood (New construction, 4 buildings, 84 units)

Renaissance at Santa Rosa (New construction, 4 buildings, 229 units)

Renaissance at Garden Walk (New construction, 2 buildings, 160 units)

Silver Oaks (Rehab, 41 buildings, 406 units)

Tupelo Ridge (New construction, 4 buildings, 92 units)

White Circle II (New construction, 3 buildings, 171 units)

White Circle III (New construction, 1 building, 108 units)

Closed out these projects in January 2020:

Villages of Castleberry (Rehab, 11 buildings, 166 units)

Sterling Candler (New construction, 2 buildings, 170 units)

City Lights II (New construction, 1 building, 96 units)

Pier Park (New construction, 10 buildings, 240 units)

Monthly DCA Projects:

Update 2024:

Alexis Parc, Anthem III, Ashley Scholars, Clairmont Senior, Clairmont Chamblee, Furlow, Hamilton Hills, Magnolia Place, Tanner Place, Village at Legacy, Walton Crossing, Walton Trail, Carmichael Commons Towns, Lenox, Decatur East, Meadow Creek, Sugar Creek, Hillside, McAuley Park, RHA Redevelopment, Douglas school, Belwood Terrace.

Quest Commons (New construction, 1 high rise building, 59 units)

Peachtree Senior Tower/ Davis Bacon: Rehab, 1 building, 196 units)

2020: 50% & 100% DCA Inspection Projects:

Madison Heights II Freedom Heights Parkside Quarry Yards

Hand Trading Highland Terrace

Americus Garden Timberfalls

Northwinds Place Walton Reserve

White Circle II White Circle III

Valley Hill Senior Edgewood Court

Centennial IV	Rolling Hills
Wood Valley	Magnolia Terrace
Heritage Family	Arbor Lake
Swanton Heights	Woodlands
The Phoenix	North Point Village
Vining's Senior	Perkins Field
Highlands at Kayne	Park Trace
Piedmont Hills	Hunters Run
Grove Park	McEachern Village

Accessibility Projects:

Update 2024:

Barge, Bessemer SS, Boulevard North, Furlow, Clairmont Senior, Clairmont Chamblee, Douglas School, First Baptist Church, Hamilton Hills Ph 1 & Ph 2, Auburn Grande, Hillside, Hollywood Family, Magnolia Place, Meadow Creek, Sugar Creek, Ashley Scholars, Tanner Place, Trinity Flats, Walton Crossing, Walton Kennesaw, Walton Trails, Walton Holly Springs, Scholars at Town, Pinewood.