



Homeowner's Guide

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Dear Homeowner,

Thank you for choosing Yates Remodeling LLC for your project. During my nearly 20 years in the remodeling industry, I have been proud to provide high quality and efficient services. I founded Yates Remodeling to create special living spaces and fulfill my vision of the intersection between great design and quality construction. My team and I will take your ideas, draft them into stunning 3D designs, and build the space of your dreams.

This Homeowner's Guide was created so that you will have a handy reference as we work through this project together. You'll learn about the process we will undertake together to ensure the goals for your project are met. You can also review how to utilize Buildertrend, our online portal, to monitor your project.

Using our exclusive team approach, we coordinate closely together to ensure every aspect of your remodel has the attention and care required to achieve exceptional results.

When you work with Yates Remodeling LLC, every aspect of the project will be customized for you and your home. We look forward to working with you to ensure the final product reflects your unique vision.

Sincerely,

Cameron Yates
Owner



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Our Process

What is a design-build remodeler?

A design-build remodeler both designs the living spaces you, the client, have been dreaming of and ensures that it is built to fulfill that vision. Using a 3D CAD software, we will create floor plans and 3D renderings based on your descriptions of the projects. We then coordinate with any designers, subcontractors, vendors, and permitting entities required to get the job done. And at the same time, we'll communicate with you regularly throughout your project so you always know what to expect and have your finger on the pulse of the project.

What is our process?

Setting Up Our First Meeting

When you contact Yates Remodeling LLC for help with your project, we'll ask you some basic questions about your project to ensure we can be of assistance. We'll also ask you for some contact information, the location of the job site, and anything else we may need to know before we meet in person. You'll receive a Google meeting request and an invitation to Buildertrend, our online project management portal, that will allow you to review your estimate, make payments, communicate with the team, and track progress from start to finish. Before your estimate, you can upload any inspiration photos, designs, surveys, or other relevant documents and photos onto Buildertrend so that we can come prepared and up-to-speed on your project.

Your Initial Estimate Meeting

Your first meeting will be an initial estimate meeting. During this mutual interview, we'll go over what your vision for the project is, your budget, preliminary design ideas, likely materials to be used, scheduling, and the initial estimate process. We find the best first meetings are the ones where clients come prepared with a list of ideas and a clear budget. We'll be listening carefully to you to ensure we put together a plan that will meet your goals on budget.

Budget

Your budget is critical to this process because the same project, say a 400 square foot Master Bathroom remodel, can be built at a variety of costs. When we know your budget, we can suggest tile, plumbing fixtures, lighting fixtures, and many other features that will work for you. When we don't understand your budget, we'll design based on your vision and that might produce an estimate that will be out of reach. Lots of people may have an idea of what their dream project costs but might be leaving out very expensive details. The key is that we are on the same page and on the same team. Please also note that due to COVID 19, materials prices have greatly increased and the lead time to get some materials and fixtures has also increased. Please ask us about the current estimates for delivery and pricing on key features such as EZE Breeze.

Post Initial Estimate meeting

Using measurements from our estimate meeting, the information you provided about your budget, functionality, possible materials, and design ideas, we will develop an initial estimate. Additional information and visits with subcontractors for detailed pricing or engineering may also be required. For



example, if your project includes potential moving a wall, we may need to bring an engineer to better understand the impact of that change which can range. That will help us provide you a better estimate without surprises during the project that would otherwise inflate your budget. The initial estimate will give you a close idea of exact costs of your project. At this point you can modify the project or scope of the work to realize your goals. Our estimates are the beginning of a dialog to fine tune the project so that it will work for you. So please do not hesitate to talk with us about the estimate and fine tune it as needed. For some of our clients, breaking the estimate into a design phase and a construction phase is helpful to better visualize their project. This can be especially helpful for projects where the design and layout may have a significant impact of the cost of the project.

Deposit and Payments

Once the estimate reflects your vision, you can then approve it on Buildertrend. In order for us to add your project to our queue and begin designs, a 20% deposit by check payable to Yates Remodeling LLC or e-check is required. You may also pay by credit card with the inclusion of credit card fees to your invoice. Once the job begins and/or we order materials and selections, we will bill you weekly for any work to be done the coming week along with any work that has been completed up to that point that has not been paid for (this does not include change orders). Your 20% deposit will be used to cover the initial work and material purchases and you will be notified when your first weekly payment will be due after the deposit has been allocated.

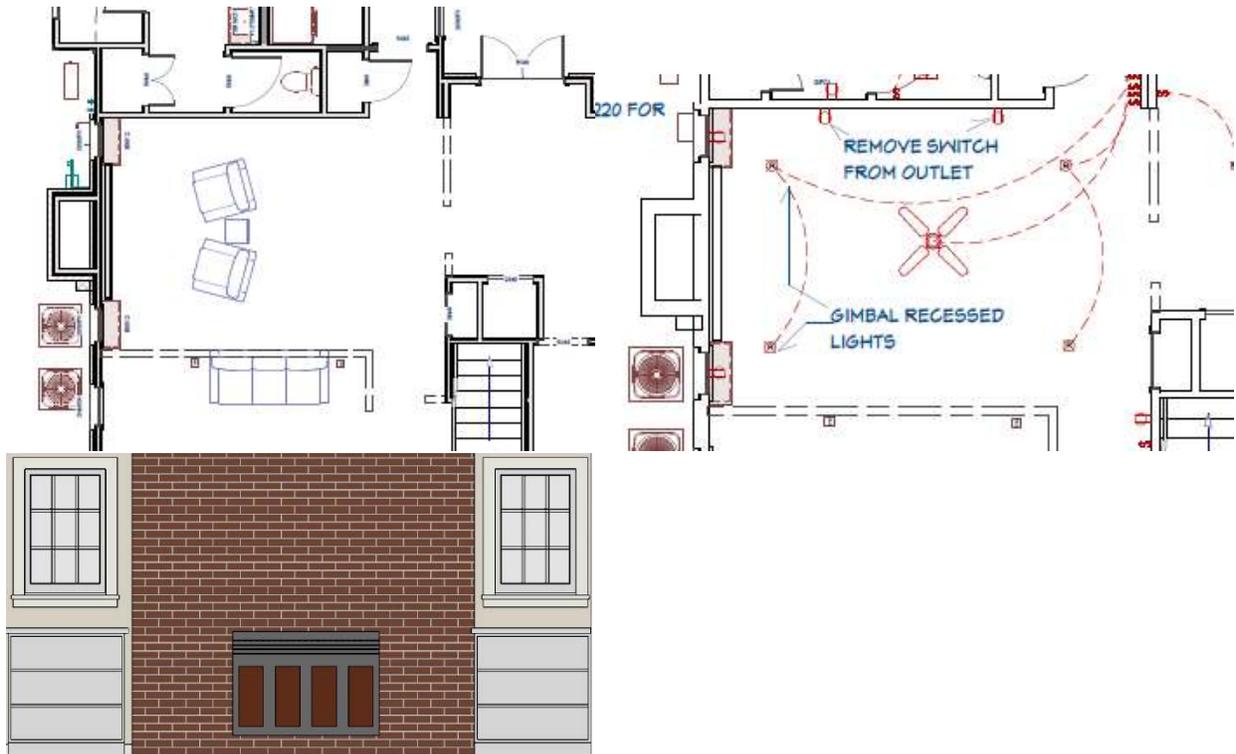
Weekly billing will be sent out by Wednesday and will be due that Friday. Any change orders that are made after final design has been completed will need to be approved and paid for before work will be started. This may hold up production. An administrative fee may be added to all change orders depending on their impact. All costs will be listed on the change order for approval before work will begin.

If weekly progression payments are not made when due, work may be delayed or deferred. If payments are not received within 5 days of the due date a 1.5% late fee will be charged to account, as well as 1.5% compounding for every 30 days after that. Five percent of the total end project costs will not be billed until the project is complete, all inspections are passed, and you have completed a final walkthrough of the project.



Design phase

Depending on the scope of your project, we'll create floor plans and drawings in CAD, computer-aided design and drafting, to create a realistic, 3D model of the finished project.



Please note how multiple floorplans, layouts, and 3D renderings may be created to capture any detail required to ensure every aspect of your dream space is captured.



During the CAD design process, after we have an initial design, we will have an engineer create specifications on how the structure will need to be built or altered. We will use this information as part of the final design. With the CAD drawing complete, we'll ask you to review the plans and provide feedback. Once the layout has been approved, we can then begin any detail work required for electrical, HVAC, Plumbing and any other plans needed.

The design phase is also the stage at which we'll make material and product selections that replace the allowances from the initial estimate. For some of our clients the design phase is the most fun part of the project while for others it can be an overwhelming experience. There are endless choices of every material you can imagine from siding, cabinetry, tiling and on and on. How we approach this phase depends on you. If the project requires matching materials to existing carpentry or finishes in your home, we'll recommend a selection of materials, parts, and finishes that we think will achieve the look you want. If the project requires matching the style of your home, but does not need an exact match of materials, we can bring you items to choose from or together we can take a trip to the design center to help you navigate the choices and ensure the budget implications are clear. Design decisions can play a large role in the final project costs.

Project Manager

Each of our projects has a Project Manager that you will meet prior to construction. Your Project Manager will be your day-to-day contact person for any questions and concerns. Your Project Manager will supervise subcontractors, inspect work, and ensure you are notified of any schedule shifts. Project Managers are available from 8:30 AM to 5:00 PM Monday through Friday. We encourage you to use Buildertrend to message your Project Manager with any issues. Buildertrend messages are monitored by our staff so that if someone is unavailable during an emergency, you get the help you need when you need it.

Subcontractors

We may bring in subcontractors to appraise the job and provide additional insight into pricing. We have a list of preferred subcontractors that we have used on many projects whose quality of work we can depend on. We will coordinate the permitting and scheduling of each trade required for your project and ensure their quality and consistency.

Scheduling

We work hard to create schedules that are realistic and ensure the project is completed on time and to plan. Weather, time to receive order materials and products, permits, and inspections can all effect the schedule. We'll try to build in time to create flexibility for the unexpected. We hope you'll keep unexpected delays in mind as well as we work to meet your final delivery date. Access to the job site when needed is a critical aspect of keeping the project on schedule. We will need a key or access code so that work can commence on time. While generally work is done between 8:30 AM and 5:00 PM, our subcontractors may request and early start or a late day and even the occasional weekend. Often these requests are designed to keep the project on track or negotiate anticipated weather challenges. Your assistance in accommodating these shifts is appreciated.



Permits and Permissions

Yates Remodeling will acquire any permits and permissions required to proceed with the project. Each city, town, and unincorporated area has a different permitting office with different rules and fees for permits. We'll navigate these government entities for you to ensure your project is completed to code. If you have a Home Owners Association (HOA) they also may have a set of rules and permissions that you'll need to obtain. Understanding what will be required and what the timeline is for each of these approvals will be critical as we design the schedule and final estimate. Please share your HOA's approval forms with us so that we can provide you with any information required for your application.

Mark-up and Taxes

Mark-up is a general term that applies to the overhead and profit that any company needs to stay in business. It is the amount a business charges above their direct cost. It covers overhead items such as; advertising, sales commission, job supervision and scheduling, office expenses, project management software, insurance, accounting and legal fees, licenses, taxes, warranties, shop costs, tools, storage, employee expenses and salaries. These are some of the overhead expenses for a remodeling company. We do the best we can to keep costs as low as possible while still staying in business and providing the best possible service and products to our customers. All our estimated figures always include our mark-up. This can be a confusing subject for most, here is a link to an article that does a great job explaining this in more detail: <https://www.markupandprofit.com/blog/how-much-should-contractor-charge>

Allowances

As part of your estimate, you will receive an "allowance" for each of the items you will select (Selections) as part of the design process. These are estimated dollar figures based on what we have learned about the style and quality of the items you have asked us to install. For example, you will receive an allowance for light fixtures if we are installing new lighting. The allowance might be an amount or a dollar range. We will provide you a variety of items that will work with your design and the specifications of the remodel within your allowance. It will then be your choice to follow the allowance, exceed it, or use less than the allowance. If you select an item that is more expensive than the allowance, that increase will be reflected in your invoice. If you select an item that is less than the allowance amount, that decrease will also be reflected in your invoice. Please note that your Selections are invoiced separately from weekly Work & Materials invoices to ensure we are able to purchase your selections in a timely manner.

Change Orders and Troubleshooting

While our CAD drawing will give you a strong idea of what the project will look like, on occasion once the paint is on the wall you may not like the color, or you may want to add doors to your built in. We'll work with you to make changes along the way and help you understand any impact to the budget and timeline they may cause. Also, once we start opening walls and digging holes, we may find unexpected surprises. We'll work with you to troubleshoot any of these surprises and discuss any necessary budget adjustments as a result. A good rule of thumb is to plan 10% of the budget for any potential issues.



Review Us

Upon completion of the project, we'll invite you to review us on social media and share your experiences. As a small business, we rely on referrals and reviews and hope you'll love your project and want to share it. The craftsmanship of our work has a lifetime guarantee, but should you ever need anything else, please think of us

Buildertrend – Your Online Portal

Buildertrend is a powerful online tool and mobile app that will help you monitor the progress of your project from start to finish. In this section of your Homeowner's Guide, we'll walk you through the portal as viewed on a computer. For additional help, you can visit Buildertrend's Help Center which has a wealth of information and videos.

Why Use Buildertrend?

Yates Remodeling LLC uses Buildertrend to manage all our projects. Our team members log in every day to update project status, upload pictures, add important milestones and work to the calendar, and more. Because we rely on this powerful tool, you can too. We will communicate with each other through the portal on a desktop or the mobile app. You'll be able to review and approve your estimate and make payments. You can send us pictures of ideas you have or of the paint can that was used for the color in your kitchen. So, while you can reach us without it, Buildertrend is the best way to monitor your project in real-time.

New Client Email Invitation

When you contact Yates Remodeling LLC to request an estimate, we'll gather information from you to create your account on Buildertrend. This will include your:

- Name
- Address of the project
- Your mailing address – if different from the location of the project
- Email address
- Phone number (cellular or home)
- A description of your project

The email invitation will come from Buildertrend, so please check your Spam folder if you do not see the email the same week you made your appointment.



Logging in the First Time

The first time you log into Buildertrend, it will ask you to create a user name and password. Once you are in the portal you will see a menu bar with all of your many options to monitor the project.



The default opening page is the Summary page. Here you will see your name, address a summary of the project financials, a photo of the front of your home, a “What’s Happening” dashboard (see below), the weather forecast, a calendar and a comments section.

WHAT'S HAPPENING	
To-Do's	0
Unread Documents	0
Messages	0
Pending Change Orders	0
Upcoming Selections	0
Warranty Items	0
Surveys	0
Payments	0
Recent Daily Logs	0

The What’s Happening dashboard gives you an at-a-glance view of activities that you might want to be aware of. Each of the items on the What’s Happening Dashboard are also in the Menu at the top of the page. Let’s go through them together.

Menu Options

To-Do’s

We’ll update To-Do’s for your project in this section. On occasion, you might even be assigned a to-do. For example, we might ask you to clear out the room where we’ll be refinishing the floors.



Calendar

Here you'll be able to see what we have scheduled to occur at your site any given day. For example, the city inspector's visit. You can also see links to photos that we uploaded on a particular day.

Daily Logs

If there has been an activity we want to bring to your attention, it will be noted here in the daily log. This will mostly be information for Yates Remodeling team members. But that app will let us tag and notify you if it is something we wish to bring to your attention.

Documents

On this page you'll find permits, blueprints, and any other important documentation to complete the project.

Videos

On occasion the Yates team may upload a video which you can view here.

Photos

In this section you'll see photos we've uploaded of your project. You can also upload your own photos. This is a great page to see before and after photos which you can even download to share with friends, family and on social media.

Messages

Here you will be able to receive and send messages to Yates Remodeling Team Members. Feel free to reach out at any time with questions or instructions.

Comments

This is where you can add comments about the project or provide feedback on the work.

Change Orders

When you request a change to the project from what was on the Final Estimate, you will receive those Change Orders here. You can review and approve them here. You'll also receive information about the cost and payment for the Change Order.

Selections

This tab shows any Selections you've made for your project and is also where you can view your Allowances. It also shows the cost of that selection and the amount remaining in the project allowance according to your approved estimate.

Warranty

New, current, open and completed warranty requests can be viewed here. This will only be used after the project is complete. If you have any warranty needs, please contact us first and we will walk you through the process.

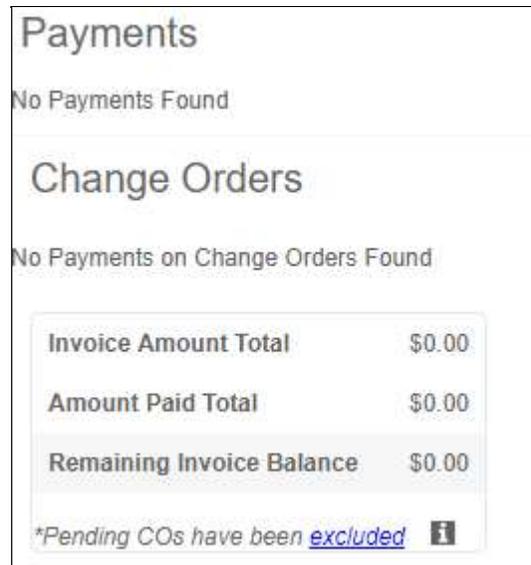


Surveys

This section gives you a place to complete any surveys we've posted for you. After your job is complete, we'll ask you to complete a feedback survey that you will find here.

Payments

In this menu option you can view all the payment information about your project.



Invoices, amounts paid, and remaining balances will all appear here. You can also make payments here using by e-check or your major credit card. Please note that credit cards are limited to charges of up to \$1,000. If you wish to pay by credit card for larger amounts, please contact the Operations Manager. All credit card charges in excess of \$1,000 will be assessed a 4% credit card processing fee through a change order.

Estimates

Once created, your estimate will appear on this page. You'll be able to review it online or print it. You'll also be able to approve the estimate online using an e-signature.

Settings

The last tab on the menu bar is the gear icon . You can click on this tab to update your contact information, change your login and password, upload a photo, or give access to your project to a "guest" of your choosing. We encourage you to upload your picture so that the Yates Remodeling team will recognize you on sight.

Questions and Troubleshooting

We hope you will find Buildertrend intuitive and user friendly. But if you have any question, we are happy to walk you through Buildertrend over the phone or meet with you in person to help you navigate the site and/or mobile app.



FAQs

Question: What do I do if there is an emergency?

Answer: If someone is injured, please dial 911 and aid the emergency workers to find the injured person. Then contact Yates Remodeling LLC's office at 919-259-2570. If the emergency is related to the project (e.g. leaking pipe) between 8:30 AM and 5:00 PM please call your Project Manager and/or contact us through Buildertrend. The entire team monitors Buildertrend messages after hours and we'll help get the issue resolved ASAP.

Question: What if I want to pay by check?

Answer: You can make your check payable to Yates Remodeling LLC and request a pick up. You may also mail it to 307 Thorn Hollow Drive, Apex, NC 27523.

Question: Can I use my own subcontractors?

Answer: Subcontractors can be an important part of the puzzle in completing your project. We carefully assess every subcontractor that we use and are confident in the quality of their work and that they are properly licensed and insured. We also orchestrate our work to ensure that activities happen in the proper order and in a timely manner. For these reasons, we use subcontractors that we have selected for your project.

Question: Can I purchase my own materials?

Answer: When we order materials for your project, we'll ensure they meet the specifications for the work, conform with the permitting and engineering rules (codes), and arrive when they are needed for the project. We also have access to contractor's discounts that consumers do not. That is why we purchase all materials needed for the job. If you do purchase your own materials, you should expect additional charges to your project. Yates Remodeling is also not responsible for any Warranty work on materials we do not purchase.

Question: How long will the project take?

Answer: Depending on the scope of work, your project timeline can vary. Weather, building permits, and inspections can also impact the time it takes to complete a project. We will update the calendar on Buildertrend as often as possible. Please feel free to utilize this tool to see the status. Your Project Manager can also be a helpful resource to understand how the project is moving along.

Question: How do I make a change to the scope of the project?

Answer: Changes to the project after the Estimate has been approved are called Change Orders. You can request a Change Order by [messaging](#) your Project Manager through Buildertrend. We'll review your request and contact you for additional information and/or submit a Change Order through Buildertrend for your review and approval. Payment will be due at the time of approval. Please note that in order to complete your project on time, Change Orders may have a very short approval timeline.



Questions: How do I give feedback about a Yates Remodeling team member or Subcontractor?

Answer: If you wish to give feedback about a Yates Remodeling team member or the Operations Manager, please contact the Owner, Cameron Yates by email at cameron@yatesremodeling.com or 919-259-2570

Contact Us

Yates Remodeling LLC Office is open Monday through Friday from 9 AM to 4 PM. We are closed on the following Holidays:

- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day and the Friday after Thanksgiving Day
- Christmas Eve to New Year's Day, Dec 24 – Jan 1, Return Jan 2

For communications regarding your project, please message us through the Buildertrend website or mobile app.

You can also reach us via email at info@yatesremodeling.com and by phone at 919-259-2570.