



UA Compliance Report

Date: 1/6/2024

**Proposal valid for six months*

Terry Fitzpatrick

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SOUTHERN ENERGY MANAGEMENT

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Thank you for your interest in Southern Energy Management's building performance services. Southern Energy Management (SEM) is a leading sustainable energy company in the Southeast and Mid-Atlantic providing high-performance building energy efficiency consulting and testing, as well as renewable energy solutions for both residential and commercial markets. As a company, SEM provides intelligent, holistic, and effective products and services that save energy, money, and natural resources.

Company Mission

Southern Energy Management is one of the first B-Corporations in North Carolina and the first sustainable energy company to certify itself as a B Corporation. As a B Corporation, SEM is verified by a third party to be a triple-bottom-line company. The triple bottom line approach is a sustainable business philosophy that takes into account people and the planet, alongside profit. Certified B Corporations meet rigorous, independent standards and are evaluated on both social and environmental performance.



Why SEM

SEM provides the following value-add services (included in the fees outlined below) to help you market and sell your energy-efficient homes and capture incentives where available:

- Kick-Off training with construction, marketing, & sales teams to align goals and review provided tools
- Web Content Package: icons, graphics, text, etc.
- Access to and support from SEM marketing team
- On-going training for sales team
- Homebuyer-focused print collateral
- Event support
- Quarterly Builder Performance Report
- Incentives tracking and submission when available

SEM Service Guarantee

- A highly qualified team member will be scheduled on-site within 4 business days of your request
- All phone calls and emails will be responded to within 1 business day
- All certification packets will be uploaded digitally to our builder portal within 7 business days of the final inspections

If any of these guarantees are not met, Southern Energy Management will gladly perform your inspection for free.

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Scopes of Work

PRE-CONSTRUCTION CLIENT EXPECTATIONS

The client will complete and submit the following information to Southern Energy Management before completion of the requested service item(s) noted above:

1. Signed SEM Services Proposal¹
2. Completed SEM Project Form²
3. Set of plans that include all floor plans, elevations³

CONTRACTOR EXPECTATIONS

1. Southern Energy Management will provide Client/Builder with a UA Compliance Report based on the building plans and project input specifications provided.

Deliverables

1. UA Compliance Report

¹ Where provided

² Where provided

³ A window and/or door schedule may be required if window and door information is not present on project plans and/or elevations

Builder Information

Company Name:					
Address:					
City:		State:		Zip:	
Contact Name:					
Email:					
Office Phone:			Mobile:		

Accounts Payable

Contact Name:					
Email:					
Office Phone:		Mobile:			
Preference for receiving invoices:		Email <input type="checkbox"/>	Auto Pay <input type="checkbox"/>		
Payment method:		ACH <input type="checkbox"/>	Check/ Credit Card <input type="checkbox"/>		
Require POs?	Yes <input type="checkbox"/>	How to access POs?	Portal <input type="checkbox"/>	Email <input type="checkbox"/>	
Do you have an online trade portal?		Yes <input type="checkbox"/>	No <input type="checkbox"/>		
If so, please provide a link:					
Who do we contact for purchase orders?		Name:			
Email:		Phone:			

Plan Access

Best means for us to access your plans:	Online Portal <input type="checkbox"/> Cloud Storage <input type="checkbox"/> Email <input type="checkbox"/>			
Contact Name (If applicable):				
Email:			Phone:	
Link to cloud storage site (If applicable)				

Schedule of Fees

Item	Fees (Per Home)	Client Initials for Approval
Service Item UA Compliance Report	\$350	

Payment Terms

Service Item(s):

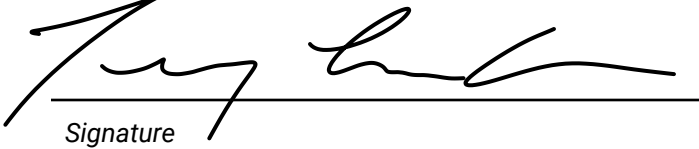
- 1. Southern Energy Management will invoice items at 100% upon completion.
- 2. Invoices to be mailed unless otherwise indicated on the SEM Project Contact Form (see Project Form for more details). Please initial any extra options selected.
- 3. **TERMS NET 30 DAYS**

If accepted, please sign and return to Southern Energy Management: builderservices@southern-energy.com or fax to: (919) 836-0305.

Proposal Accepted

The above scope of work, terms and contract are satisfactory, and (I) (we) hereby authorize the performance of this work.

Terry Fitzpatrick


Signature

Date

Southern Energy Management, Inc.

Signature

Date