

Purchase and Sale Agreement

Meeting Detail Summary

When	<ul style="list-style-type: none">• Between 10:00 a.m. and 4:00 p.m., Tuesday through Saturday• Between 12:00 p.m. and 4:00 p.m. on Sunday
Where	<Community> sales office
Attendees	<ul style="list-style-type: none">• Purchasers• <Community> sales associate• Your real estate agent is welcome, but not required to attend
Length	30 minutes to 2 hours, depending on your questions
Purpose	To document your decision to purchase a [community] home
Preparation	<ul style="list-style-type: none">• Review the meeting agenda which follows on the next page• Make note of any questions• Bring this guide; we will be referring to it and adding new paperwork to it• Please arrange to attend alone; we need your undivided attention

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Purchase and Sale Agreement Agenda

Purchaser _____	Date _____
Address _____	Community _____
Home phone _____	Home site _____
Work phone _____	Plan _____
E-mail _____	Target closing _____

Your signature confirms you have received or discussed all items checked below.

Documents/Discussion

- Homeowner guide _____ edition
- Purchase and Sale Agreement
- Addenda
- Deposit receipt
- 8 ½ x 11 Plans
- Specifications
- Selections list
- Reimbursable expenses
- Financing
- Commence construction time table
- Change orders
- Conformance with plans & specs
- Plan ownership
- Site visits
- Noninterference
- Acceptance/orientation
- Site clean-up
- Insulation notice
- Radon disclosure
- Limited warranty specimen
- Homeowners association documents
- Target delivery date & updates
- Settlement
- Possession: storage of belongings
- Insurance
- Default or termination
- Alternative dispute resolution
- Co-op broker
- Entire agreement
- Homeowner guide review
- Upcoming meetings: mortgage and selections

Follow Up Items

Preferred point of contact for updates or questions:

_____ at _____

Purchaser _____	Date _____
Purchaser _____	Date _____
Sales Associate _____	Date _____

Mortgage Application

Meeting Detail Summary

When	<ul style="list-style-type: none">• Within five business days of signing your Purchase and Sale Agreement• Between 9:00 a.m. and 5:00 p.m., Monday through Friday• Saturday by appointment
Where	On-line, by phone, or at the [community] sales office
Attendees	<ul style="list-style-type: none">• Purchasers• Your mortgage loan officer
Length	15 minutes to one hour, depending on your questions
Purpose	To select an appropriate loan program and initiate your mortgage application
Preparation	<ul style="list-style-type: none">• Review the mortgage discussion in this guide• Review the meeting agenda which follows on the next page• Make note of any questions• Bring (or have) this guide; we will be referring to it and adding new paperwork to it• Please arrange to attend alone; we need your undivided attention

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Mortgage Application Agenda

Purchaser	_____	Date	_____
Address	_____	Community	_____
Home phone	_____	Home site	_____
Work phone	_____	Plan	_____
E-mail	_____	Target closing	_____

Your signature confirms that you have received or discussed all items checked below.

Documents/Discussion

- Loan application
- Good faith estimate
- RESPA booklet
- Truth in lending disclosure
- Verification of employment
- Verification of deposit
- Verification of mortgage
- Credit report authorization
- Underwriting process
- Additional documentation
- Loan amount requested
- Loan approval time frame
- Contingencies
- Loan lock
- Other

Follow Up Notes

Preferred point of contact for update or questions:

_____ at _____

Purchaser	_____	Date	_____
Purchaser	_____	Date	_____
Loan Officer	_____	Date	_____

Selection Appointments

Meeting Detail Summary

When	<ul style="list-style-type: none">• After mortgage approval• Between 9:00 a.m. and 5:00 p.m., Monday through Saturday
Where	<Community> selections studio
Attendees	<ul style="list-style-type: none">• Purchasers• Selection consultant
Length	1-2 hours each
Purpose	<ul style="list-style-type: none">• Selections orientation: to become familiar with features, materials, and colors available for your home• Final selection: to finalize your decisions and document your choices
Preparation	<ul style="list-style-type: none">• Review the selection discussion and tips in this guide• Review the meeting agenda which follows on the next page• Make note of any questions• Bring this guide; we will be referring to it and adding new paperwork to it• Bring notes, color samples, photos, or drawings that define or illustrate your preferences for your new home• Please arrange to attend alone; we want your undivided attention

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Selection Appointment Agendas

Purchaser _____	Date _____
Address _____	Community _____
Home phone _____	Home site _____
Work phone _____	Plan _____
Email _____	Target closing _____

Your signature confirms you have received or discussed all items checked below.

Meeting 1: Orientation

- Included features
- Selections available
- Selection hints
- Browsing hours
- Order for making selections
- Upgrade Amendment
- Design consultation
- Additional hours

Follow Up Items

Meeting 2: Final Selections

- Cabinets
- Bult-ins
- Floor coverings
- Countertops
- Appliances
- Electrical options
- Light fixtures
- Plumbing fixtures
- Preconstruction conference

_____ Purchaser	_____ Date
_____ Purchaser	_____ Date
_____ Selection Consultant	_____ Date

Preconstruction Conference

Meeting Details

- | | |
|--------------------|---|
| When | <ul style="list-style-type: none">• After your selections have been finalized• Between 9:00 a.m. and 2:00 p.m., Tuesday through Friday |
| Where | Sales office |
| Attendees | <ul style="list-style-type: none">• Purchasers• <Community> sales consultant• <Community> construction manager |
| Length | 1-2 hours |
| Purposes | <ul style="list-style-type: none">• To meet your construction manager• To review your floor plans, selections, and any approved changes• To discuss realities of new home construction |
| Preparation | <ul style="list-style-type: none">• Review the discussion of construction protocols in this guide• Review the meeting agenda which follows on the next page• Make note of any questions• Bring this guide; we will be referring to it and adding new paperwork to it• Wear shoes appropriate to walking on your new home site• Bring your camera if you like• Please arrange to attend alone; we want your undivided attention• In particular, keep in mind that children under 16 are prohibited from active construction sites |

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Preconstruction Conference Agenda

Purchaser _____	Date _____
Address _____	Community _____
Home phone _____	Home site _____
Work phone _____	Plan _____
Email _____	Target closing _____

Your signature confirms you have received or discussed all items checked below.

Documents/Discussion: Office

- Site plan
- Soil report
- Drainage plan
- Status of permit
- Utilities status
- Homeowner association issues
- Landscape plans
- House plans
- Multi-Family: Partition wall construction
(sound, odor, and light exposure)
- Specifications
- Selections and options
- Change requests
- Change order cutoff schedule
- Target start date
- Construction sequence/schedule
- Events that extend schedule
- "Nothing's happening"
- Quality, builder's inspection of work
- Site visit guidelines
- How to handle questions
- Target delivery date
- Review maintenance and warranty
- Frame stage tour

Discussion: On Site

- Lot boundaries and easements
- Orientation of home
- Trees and other natural features
- Drainage
- Mailbox/utility junction locations

_____ Purchaser	_____ Date
_____ Purchaser	_____ Date
_____ Construction Manager	_____ Date

Frame Stage Tour

Meeting Details

When	Between 12:00 p.m. and 4:00 p.m., Monday through Friday
Where	At your new home
Attendees	<ul style="list-style-type: none">• Purchasers• <Community> construction manager
Length	30 minutes
Purposes	<ul style="list-style-type: none">• To confirm installation of your selections• To observe the quality we put inside the walls of your new home• To discuss any questions you have
Preparation	<ul style="list-style-type: none">• Review safety reminders listed in this guide• Review the meeting agenda which follows on the next page• Make note of any questions• Bring this guide; we will be referring to it and adding new paperwork to it• Wear clothing and shoes appropriate to an active construction site• Bring your camera if you like• Please arrange to attend alone; we want your undivided attention• In particular, keep in mind that children under 16 are prohibited from active construction sites

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Frame Stage Tour Agenda

Purchaser _____	Date _____
Address _____	Community _____
Home phone _____	Home site _____
Work phone _____	Plan _____
Email _____	Target closing _____

A construction tour was completed on this date to review topics listed below and confirm correct installation of selections visible in the home at this time. Some items listed on selection sheets or described in change orders may not be apparent at this stage of construction. Your signature confirms you discussed the items listed below.

Exterior

- Elevation
- Exterior finish materials
- Meter locations
- Air conditioner condenser location
- Patio/deck
- Hose bib locations
- Property boundaries
- Drainage swales
- Driveway
- Sidewalk

Follow Up Items

Interior

- Foundation system
- Beams and supports
- Framing options
- Floor system
- Doors and windows
- Ceiling details
- Trusses
- Roof sheathing
- Flashing
- House wrap
- Electrical options
- HVAC options
- Plumbing options
- Built-ins
- Basement floor
- Underground services

_____ Purchaser	_____ Date
_____ Purchaser	_____ Date
_____ Construction Manager	_____ Date

Homeowner Orientation

Meeting Details

- When**
- Between 8:00 a.m. and 3:00 p.m. Monday through Friday:
 - Between 8:00 a.m. and 11:00 on Saturday
- Where** Your new home
- Attendees**
- Purchasers
 - <Community> quality assurance manager
- Length** 2 hours
- Purposes**
- To demonstrate operation of the components of your home
 - To review your maintenance tasks and our warranty commitments
 - To confirm the good and acceptable condition of the home
- Preparation**
- Review the *Caring for Your Home* section of this guide and <Community> Limited Warranty document
 - Review the meeting agenda which follows on the next page
 - Make note of any questions
 - Bring this guide; we will be referring to it and adding new paperwork to it
 - Wear clothing and shoes appropriate to touring your home inside and out
 - Please arrange to attend alone; we want your undivided attention

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Homeowner Orientation Agenda

page 1 of 2

Purchaser _____	Date _____
Address _____	Community _____
Home phone _____	Home site _____
Work phone _____	Plan _____
Email _____	Target closing _____

We believe that your home is complete, in satisfactory condition, and meets the quality standards described in your contract documents. We invite your confirmation of this fact by offering you an opportunity to review your home at this time. Your initials on this page and your signature on page 2 indicate that with the exception of items noted on page 2, all components of your home are in good and acceptable condition, including where applicable, the cosmetic surfaces of these items. Cosmetic damages noted subsequent to those identified today and listed on page 2 are excluded from warranty coverage except as specifically described in your homeowner guide.

Selections/Change Requests

___ All selections and change order items are installed as requested and are acceptable.

Status Summary

___ Grade:	Complete	Pending	
___ A/C:	Charged	Pending	N/A
___ Crawl space:	Dry	Damp	N/A
___ Smoke detectors respond to test buttons			
___ GFCIs respond to test/reset buttons			
___ Outside faucets function without leaks			

Manufacturer Literature/Parts Delivered

___ Heat system	___ Air conditioning
___ Humidifier	___ Water heater
___ Jetted tub	___ Range
___ Cooktop	___ Range hood
___ Microwave	___ Dishwasher
___ Disposal	___ Fireplace
___ Broiler pan	___ Disposal wrench
___ Sink strainer and drain cover	___ Garage door openers or keys
___ Paint samples	___ _____
___ _____	___ _____

Warranty Service

For your protection and to allow efficient operation of our services, our warranty system is based on your written list of items. Please refer to Section 8 of your homeowner guide for complete details.

Purchaser _____	Date _____
Address _____	Community _____
Home phone _____	Home site _____
Work phone _____	Plan _____
Email _____	Target closing _____

Follow Up Items

To forestall misunderstandings resulting from imperfect memory or variations in interpretation, all agreed upon items have been listed for follow up action.

Purchaser _____	Date _____
Purchaser _____	Date _____
Quality Assurance Manager _____	Date _____

All items noted for follow up on the list above have been resolved or completed.

Purchaser _____	Date _____
Purchaser _____	Date _____
Quality Assurance Manager _____	Date _____

Confirmation Tour

Meeting Details

When	Between 8:00 a.m. and 4:00 p.m., Monday thru Friday
Where	Your new home
Attendees	<ul style="list-style-type: none">• Purchasers• <Community> quality assurance manager
Length	15-20 minutes
Purposes	<ul style="list-style-type: none">• To review completed items• To confirm remaining items and known scheduling details
Preparation	<ul style="list-style-type: none">• Bring this guide and your copies of the homeowner orientation forms for reference• If your phone number is changing, please bring the new number so that we can update our records

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Confirmation Tour Agenda

Purchaser _____ Date _____
Address _____ Community _____
Home phone _____ Home site _____
Work phone _____ Plan _____
Email _____ Target closing _____

Homeowner Orientation items remaining to be completed and available scheduling details:

Item #	Item	Notes

Additional Follow Up Notes

Expected move-in Date _____

New phone number _____

*60-day Warranty Visit _____

*11-month Warranty Visit _____

*We will confirm these routine warranty visits with you one or more days prior to the appointments. For details about warranty service between these visits or in an emergency, please refer to the Caring for Your Home section you're your homeowner guide.

Purchaser _____ Date _____
Purchaser _____ Date _____
Quality Assurance Manager _____ Date _____

Closing Appointment

Meeting Details

When	Between 9:00 a.m. and 4:00 p.m., Monday through Friday
Where	Title company office
Attendees	Purchasers
Length	1-2 hours, depending on your questions
Purpose	Conclude the purchase of your new home
Preparation	<ul style="list-style-type: none">• Review the discussion of the closing process in this guide• Review the meeting agenda which follows on the next page• Resolve any questions about your home or financing prior to the appointment• Arrange for the transfer of utility service into your name• Have evidence of insurance forwarded to the title company one week prior to your appointment• Obtain necessary funds in the amount and form required• Arrange to attend alone; we want your undivided attention

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Closing Agenda

Purchaser _____	Date _____
Address _____	Community _____
Home Phone _____	Home site _____
Work Phone _____	Plan _____
Email _____	Target Closing _____

Your signature confirms you have received or discussed all items checked below.

Documents/Discussion

Follow Up Items

<provided by the title, escrow company
or closing attorney's office>

_____ Purchaser	_____ Date
_____ Purchaser	_____ Date
_____ Closing Agent	_____ Date

Warranty Visit

Meeting Details

When	<ul style="list-style-type: none">• Between 8:00 a.m. and 4:00 p.m., Monday through Friday• Between 8:00 a.m. and 12:00 on Saturday
Where	Your home
Attendees	Homeowner or an adult (an individual 18 years or older) representative
Length	10 minutes and up, depending on your questions
Purpose	<ul style="list-style-type: none">• To confirm the home we built for you meets the standards we promised you• To review key points about home maintenance• To determine appropriate action on potential warranty items• To answer your questions about operation and care of your home
Preparation	<ul style="list-style-type: none">• Review warranty coverage as outlined in this guide• Note items or home care questions• As needed, tape or tag areas you believe need attention to avoid overlooking any items you wish to discuss• Select a couple of dates 10 days or more into the future for repair appointments in the event one is needed

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Warranty Visit Agenda

Homeowner _____	Date _____
Address _____	Community _____
Home phone _____	Home site _____
Work phone _____	Plan _____
Email _____	Closing date _____

Exterior

- Backfill
- Drainage
- Downspout extensions
- Concrete flatwork

Follow-Up Items

Interior

- Front Door
 - Lock and deadbolt
 - Threshold
 - Weather strip
 - Doorbell
 - Back Door
 - Lock
 - Threshold
 - Weather strip
 - Patio door lock
 - Garage overhead door
 - Smoke detectors
 - Furnace filter
 - Interior doors
 - Interior trim
 - Cabinets
 - Tile
 - Caulk
 - Window operation
 - Drywall
 - Floor coverings
- Homeowner list?

Homeowner _____	Date _____
Homeowner _____	Date _____
Warranty Representative _____	Date _____