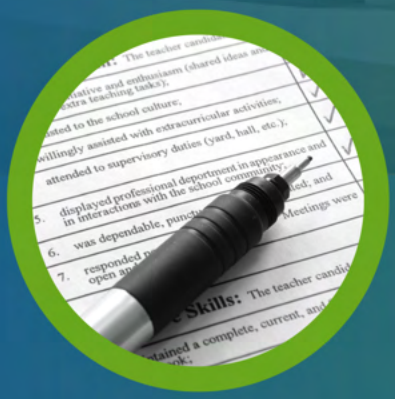
HOMEPLEX
THE NEW AMERICAN DREAM

ADU & SB-9 Consulting Services

A-Z ADVISORY FOR YOUR ADU



VIRTUAL ASSESSMENT GARAGE CONVERSION

Getting Started

$1,250*

- Virtual Site Assessment
- Intro ZOOM consultation
- Project Budget Estimate
- Pre-construction Budget (required for CalHFA ADU grant)

PROJECT FEASIBILITY ASSESSMENT

Feasibility

$2,500*

Getting Started Package +

- On-site Assessment
- SB-9 Qualification
- Up to 3 ADU options
- Local Permit Timeline Stats
- Rental Comparables
- Return on Investment

FEASIBILITY & ADVISORY CONSULTING

Comprehensive

$5,500*

Feasibility Package +

- ADU Design Review
- Access to our Network
- Vendor Selection Assist
- Vendor Liason
- 6-months On-call Support
- Optional Permitting add-on

* If pending financing, or reserved for the CalHFA ADU Grant, a $250 deposit is payable to start this engagement. The remainder may be paid directly from loan and/or grant proceeds upon receiving your financing or grant.

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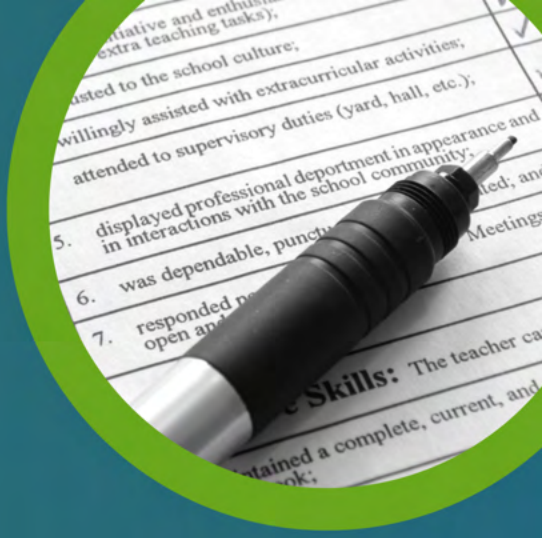

Getting Started

Virtual Assessment for Garage Conversion

This service and accompanying report is designed for homeowners who specifically want a Garage Conversion or those who understand that this option may be the most accessible first step in their income property journey. Our team of researchers and analysts study your specific property and generate a report that provides a virtual assessment of your property and garage to support you in better understanding general zoning laws and site specific information.

This starter package will provide a rough order of magnitude cost estimate range for your Garage Conversion, which will be beneficial in planning and budgeting for your ADU project. Fantastic when choosing a contractor and/or when applying for a loan.

Homeowners applying for financing and / or for the CalHFA $40k ADU Grant may also use our Rough Order of Magnitude cost estimates to determine their project budget along with the estimated pre-construction soft costs.

This package is a great first step toward understanding your options and costs. Should you desire to move forward with our full Project Feasibility Report, we will credit your payment towards upgrading to the new service.

Getting Started

$1,250*

- Virtual Site Assessment
- Intro ZOOM consultation
- Project Budget Estimate
- Pre-construction Budget
  (required for CalHFA ADU grant)

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Best Value

Project Feasibility Report

Includes Virtual Assessment

This package offers a personal virtual consultation with one of our ADU specialists to go over your specific needs, vision, short-term and long-term goals for your project. We will answer your questions regarding regulations, zoning, and the feasibility of your project. We will also review various ADU floor plans and locations on your property with our visualization software.

From there, our ADU specialists will develop a game plan on how to proceed with your ADU. An inspector will perform an on-site assessment. They will confirm the site conditions of your property, and provide us with detailed property data, photos, and other relevant information required to determine the feasibility for your ADU. With this we will build a viable plan tailored to your specific needs.

You will be given up to 3 ADU options (as allowed) for your property contained within a comprehensive report containing your zoning, property profile, and local ADU allowances & set backs according to your local jurisdiction's regulations.

This detailed report will contain an itemized scope of work, an order of magnitude cost range estimate for both construction costs and pre-construction soft costs, and the feasibility study of your desired ADU and possible SB-9 qualification.

* This report satisfies CalHFA's ADU grant budget requirement and can also be used as a great tool to solicit contractor bids to facilitate an apples-to-apples comparison. Included in this report is a full rental analysis to determine the annual income you will receive as well as a financial breakdown and analysis on cost vs ROI based on the ADU options that are determined feasible for your property

Best Value

$2,500*

Virtual Assessment +

- On-site Assessment
- SB-9 Qualification
- Up to 3 ADU options
- Local Permit Timeline Stats
- Rental Comparables
- Return on Investment (ROI)

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HOMEPLEX SERVICES

Comprehensive

Project Feasibility & Advisory Consulting

Includes Project Feasibility Report

As your homeowner's representative (owner's rep), we provide unbiased assistance representing your best interest throughout the entire process. Beginning with understanding your needs through an in depth consultation, you will receive recommendations on how to build out your property to match your vision, financial resources & unique goals. During this stage our ADU specialists will discuss and develop a game plan on how to best proceed with your ADU. An inspector will perform an on-site assessment. They will confirm the site conditions of your property, and provide us with detailed property data, photos, and other relevant information required to determine the feasibility for your ADU. With this in hand we can build a viable plan tailored to your specific needs.

Once we have together determined the scope of your project, we will help advise you in the selection of your vendors. Once your vendor has been determined, we will be there to provide advice as you work with each chosen vendor, including lenders, grant managers, ADU designers, engineers, surveyors, and assist you in soliciting and reviewing contractor bids to make a final builder selection.

Our team of ADU specialists are dedicated to ensuring that your project is successful and meets your objectives.

* This Comprehensive Package includes all of the Virtual Assessment and Project Feasibility services, plus a HOMEPLEX representative acting as your personal guide with your 3rd party vendors. We will review your designs and offer advice on your project timeline and your vendor workflow. You will have access to the HOMEPLEX Network of vetted specialists and vendors. You will have 6 month on-call support and will always have the opportunity to extend this support if you wish. Assistance with permitting management is another option you may add-on at a later date.

Comprehensive

$5,500*

Feasibility Package +

- ADU Design Review
- Access to our Network
- Vendor Selection Assist
- Vendor Liason
- 6-months On-call Support
- Optional Permitting add-on

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Permit Management Add-on

Permitting & 6-months additional Advisory Consulting

Our Permitting Management Add-on service is especially helpful when a homeowner is self managing their project and would like the added assistance of permitting their designs. This package works well in conjunction with the Comprehensive Service. As your homeowner's representative (owner's rep), we strive to provide invaluable assistance throughout the entire process typically beginning with your ADU Project Feasibility Report.

Once you have finalized your design, our team will submit your ADU plans and building permit application to the local jurisdiction and utility companies for review and coordinate payment of your fees*. We will handle communication with local jurisdiction regarding planning and building permit application and facilitate local jurisdiction planning and building permit review and processing. Our team of ADU specialists are dedicated to ensuring that your project is successful and meets your needs.

This permitting package does not include the Virtual Assessment or Project Feasibility services, however, it does include an additional 6-months of weekly on-call support to assist with permitting management until final permits are delivered.

* Note, you are responsible to pay the actual permit fees paid to municipalities and utility companies directly and this fee does not include attendance to hearings, extra-ordinary applications such as those to Coastal Commission, HOA assistance. Additional fees will be required for assistance with other permits, such as conditional use permits, variances and other requests or exceptions from the planning and/or building department.

Permit Add-on

$4,500*

- ADU Design Review
- City Compliance Check
- Prepare Permit Package
- ADU Permit Submittal
- Permit Management
- 6-months added Support

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HOMEPLEX SERVICES COMPARISON

	Getting Started	Best Value	Comprehensive
Virtual Assessment	✓	✓	✓
Estimated Budget	✓	✓	✓
On Site Assessment	✗	✓	✓
Up to 3 ADU options	✗	✓	✓
Rental Comparables	✗	✓	✓
Return on Investment	✗	✓	✓
ADU Feasibility Report	✗	✓	✓
Vetted designers, architects, contractors	✗	✓	✓
Weekly on-call advisory support calls *	✗	✗	✓
Permitting management **	✗	✗	✓ **
Coordinate Survey, Civil, Geotech, Title 24 **	✗	✗	✓ **

* On-call support includes up to 18 hours over the 6-month term
** Optional add-on: Permitting Management, Submittal & 3rd parties and adds an additional 6-months and 8 hours of on call support

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SCOPE OF WORK

Virtual Consultation

Participate in a virtual consultation with our Certified ADU Advisors to view your desired ADU with various designs and layouts using our property visualization software. We strategize with you to determine the best game plan for your ADU project from start to finish.

On-Site Inspection

A HOMEPLEX designated inspector will visit your home to confirm the site conditions of your property. During this visit they will provide detailed property data, photos, and other relevant information required to determine ADU feasibility for your preferred options. We will then build a viable plan tailored to your needs and ideas.

Project Feasibility Report

Our specialists review your zoning, property profile, setbacks, and local city regulations. You will receive a detailed report containing an itemized scope of work, contractor's estimate of both pre-construction and construction costs, and a feasibility report of your desired ADU. This report satisfies CalHFA's ADU grant budget requirements and can be used to compare other contractor bids.

Advisory Consulting (On-call support)

We provide assistance throughout the entire process* from planning, designing and constructing your ADU or duplex, to advising you on choosing property management and tax professionals. We evaluate designer and contractor cost estimates and aid in hiring real estate attorneys to review & finalize vendor contracts and act as Liaison for your vendors. Our team of ADU specialists are dedicated to ensuring that your project is successful and meets your needs. Let us help you turn your vision into a reality!

Permitting Management

Our team manages the entire permit submittal process, preparing and submitting all permits required by your city as well as assessing and navigating your local jurisdiction's rules and regulations.

* Note: On-call support is limited to up to 18 hours during the contract term. ADU architecture and design is a separately offered service

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