

McLEAN CUSTOM BUILDERS

Independent Owner's Representative · McLean, Virginia

HOW TO READ THIS DIAGRAM

What the GC is contractually required to do

— What goes wrong when no one is watching

✓ How your Rep observes, advises, and protects you

Your Rep observes and advises. Your GC builds. Your inspector certifies. Three separate roles — all protecting you.

The Luxury Home Building Process

Your Owner's Rep: Your Eyes, Ears & Advocate at Every Phase

Think of your Owner's Representative the way you think of a trusted real estate agent — present where you cannot be, experienced enough to know what to look for, and solely committed to your interests. We observe, advise, and advocate. We do not build, inspect, certify, or assume liability.

#	PHASE & TIMELINE	GC'S RESPONSIBILITY	WITHOUT A REP	YOUR REP'S ROLE
01	<p>BEFORE CONSTRUCTION Contractor Selection & Contract <i>4-8 weeks before breaking ground</i></p>	<p>GC IS RESPONSIBLE FOR</p> <ul style="list-style-type: none"> ◦ Provide a complete, detailed bid on the approved drawings ◦ Supply verifiable references from similar completed projects ◦ Execute a contract covering scope, schedule, and payment terms ◦ Carry proper licensing, bonding, and general liability insurance 	<p>△ WITHOUT AN OWNER'S REP</p> <ul style="list-style-type: none"> — You sign a contract written entirely by the builder's attorney — No change order cap — project costs can escalate without limit — Bids compared on raw price — scope gaps surface as change orders — No lien waiver requirement — you may pay twice for the same work 	<p>✓ YOUR REP'S ROLE</p> <ul style="list-style-type: none"> ✓ Review all bids side by side and advise you on what the differences mean ✓ Recommend a real estate attorney to review the contract before you sign ✓ Flag every clause that creates financial risk and explain it in plain terms ✓ Advise on contractor selection — the lowest number is rarely the safest choice
02	<p>WEEK ONE Pre-Construction Meeting & Mobilization <i>Before any work begins</i></p>	<p>GC IS RESPONSIBLE FOR</p> <ul style="list-style-type: none"> ◦ Hold a pre-construction meeting with architect, subs, and owner ◦ Submit a detailed schedule of values for all draw requests ◦ Confirm all permits are secured before equipment arrives ◦ Establish site safety protocols and communication procedures 	<p>△ WITHOUT AN OWNER'S REP</p> <ul style="list-style-type: none"> — No ground rules established — disputes arise from the first week — Draw process never defined — owner releases money without a framework — GC mobilizes before permits are finalized — stop-work order risk — Owner has no one to call when something looks or sounds wrong 	<p>✓ YOUR REP'S ROLE</p> <ul style="list-style-type: none"> ✓ Attend the pre-construction meeting as your representative ✓ Ensure draw procedures and change order approval steps are in writing ✓ Confirm permits are in hand and the GC is authorized to begin ✓ Establish that all communications from the GC come through us first
03	<p>SITE WORK Excavation, Foundation & Underground Utilities <i>Months 1-3</i></p>	<p>GC IS RESPONSIBLE FOR</p> <ul style="list-style-type: none"> ◦ Excavate and grade according to the approved civil drawings ◦ Install footings, foundation walls, and waterproofing per structural plans ◦ Pass all required municipal foundation inspections ◦ Submit the first draw request with supporting documentation 	<p>△ WITHOUT AN OWNER'S REP</p> <ul style="list-style-type: none"> — First draw released before anyone has confirmed work is complete — Site condition change orders arrive — you have no one to advise you — Subcontractors unpaid — mechanic's liens filed against your property — Billing and actual progress diverge with no one watching 	<p>✓ YOUR REP'S ROLE</p> <ul style="list-style-type: none"> ✓ Visit the site to observe general progress and report back to you ✓ Review the draw request and advise you on whether payment is appropriate ✓ Collect lien waivers from every subcontractor before each draw is released ✓ When a change order arrives, advise whether it is legitimate or manufactured

<p>04</p>	<p>STRUCTURAL PHASE Framing, Windows & Building Envelope <i>Months 2–5</i></p>	<p>GC IS RESPONSIBLE FOR</p> <ul style="list-style-type: none"> ◦ Frame per the structural engineer's drawings and specifications ◦ Install windows and exterior doors per the approved drawings and specs ◦ Properly flash and seal all window and door openings against water intrusion ◦ Submit material shop drawings for architect review before ordering 	<p>△ WITHOUT AN OWNER'S REP</p> <ul style="list-style-type: none"> – Specified materials substituted — no one present on delivery day – Windows improperly flashed — water intrusion discovered years later – Nobody present on the days when the critical work is actually happening – Structural issues accepted on the GC's word with no second set of eyes 	<p>✓ YOUR REP'S ROLE</p> <ul style="list-style-type: none"> ✓ Be present during window installation, roofing, and envelope work ✓ Observe and report to you whether work appears consistent with the drawings ✓ Identify anything that looks inconsistent and bring it to the architect in writing ✓ Advise you to engage a certified framing inspector and coordinate that engagement
<p>05</p>	<p>MECHANICAL PHASE Rough Plumbing, HVAC, Electrical & Technology <i>Months 4–6</i></p>	<p>GC IS RESPONSIBLE FOR</p> <ul style="list-style-type: none"> ◦ Install all rough plumbing, HVAC, electrical, and low-voltage per drawings ◦ Coordinate technology rough-in with the AV and smart home integrator ◦ Pass all rough mechanical and electrical municipal inspections ◦ Obtain municipality sign-off before any walls are closed 	<p>△ WITHOUT AN OWNER'S REP</p> <ul style="list-style-type: none"> – Walls close before anyone confirms the work inside is correct – Technology rough-in missed or wrong — AV system cannot be delivered as designed – Nobody tells you that a pre-drywall inspection should happen right now – Mechanical errors become very expensive once they are behind finished surfaces 	<p>✓ YOUR REP'S ROLE</p> <ul style="list-style-type: none"> ✓ Strongly advise a certified pre-drywall inspection before any walls close ✓ Coordinate that inspection on your behalf and be present when it is conducted ✓ Review the report with you and advise which findings require the GC to respond ✓ Confirm with your AV integrator that their rough-in is complete and approved
<p>06</p>	<p>INTERIOR CONSTRUCTION Drywall, Millwork, Flooring & Paint <i>Months 6–9</i></p>	<p>GC IS RESPONSIBLE FOR</p> <ul style="list-style-type: none"> ◦ Install drywall and finish to the level specified in the contract ◦ Install all millwork, cabinetry, and trim per the architectural drawings ◦ Install hardwood, tile, and stone per the specification and layout drawings ◦ Document all finish selections against the approved allowances 	<p>△ WITHOUT AN OWNER'S REP</p> <ul style="list-style-type: none"> – Allowances managed by the GC with no visibility for the owner – Finish work departs from the drawings — no one present to notice – Budget drift accumulates over months with no one tracking it – Change orders submitted for selections already included in the allowance 	<p>✓ YOUR REP'S ROLE</p> <ul style="list-style-type: none"> ✓ Visit the site at key milestones and report what we observe to you ✓ Review every draw request against the approved budget and flag any drift ✓ Review change orders and advise whether each one is legitimate or duplicative ✓ Report anything that does not appear to match the approved drawings or specs
<p>07</p>	<p>SYSTEMS & TRIM-OUT Fixtures, Appliances & Technology Commissioning <i>Months 8–11</i></p>	<p>GC IS RESPONSIBLE FOR</p> <ul style="list-style-type: none"> ◦ Install all specified plumbing and electrical fixtures per the schedule ◦ Install all specified appliances and commission per manufacturer requirements ◦ Complete technology commissioning per the AV design drawings ◦ Pass all final mechanical and electrical municipal inspections 	<p>△ WITHOUT AN OWNER'S REP</p> <ul style="list-style-type: none"> – Fixtures quietly substituted on installation day with no one watching – Technology system delivered incomplete — no one confirmed commissioning – Potential warranty items accumulate unnoticed before move-in – Manufacturer warranties never registered in your name 	<p>✓ YOUR REP'S ROLE</p> <ul style="list-style-type: none"> ✓ Be present during trim-out and observe whether specs appear to be followed ✓ Report any visible substitutions or departures from spec to you and the architect ✓ Confirm with your AV integrator that commissioning is complete and documented ✓ Flag any items now that could become warranty disputes after move-in

08	<p style="text-align: center; margin: 0;">SUBSTANTIAL COMPLETION</p> <p style="margin: 0;">Final Walkthrough, Punch List & Certificate of Occupancy</p> <p style="margin: 0;"><i>Months 11–13</i></p>	<p>GC IS RESPONSIBLE FOR</p> <ul style="list-style-type: none"> ◦ Pass all final municipal inspections and obtain the certificate of occupancy ◦ Deliver a complete punch list of all incomplete and defective work ◦ Correct every punch list item before requesting final payment ◦ Deliver as-built drawings, O&M manuals, and all warranty certificates 	<p>△ WITHOUT AN OWNER'S REP</p> <ul style="list-style-type: none"> – Owner walks through alone — dozens of defects go unnoticed – Structural or mechanical issues missed — not recoverable after the CO is issued – Final payment released before the punch list is resolved — GC has no incentive – O&M manuals and warranties never delivered – future claims are denied 	<p>✓ YOUR REP'S ROLE</p> <ul style="list-style-type: none"> ✓ Walk the home with you before you accept it from the GC ✓ Observe and note anything that appears incomplete, incorrect, or inconsistent ✓ Advise you to retain a certified inspector for items needing technical verification ✓ Advise you not to release final payment until every punch list item is confirmed resolved
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09	<p style="text-align: center; margin: 0;">CLOSEOUT</p> <p style="margin: 0;">Warranty Package, Documentation & Systems Training</p> <p style="margin: 0;"><i>Move-in month</i></p>	<p>GC IS RESPONSIBLE FOR</p> <ul style="list-style-type: none"> ◦ Deliver all as-built drawings reflecting final installed conditions ◦ Provide operation and maintenance manuals for all major home systems ◦ Provide signed builder and subcontractor warranty certificates ◦ Train the owner on the operation of all home systems before departure 	<p>△ WITHOUT AN OWNER'S REP</p> <ul style="list-style-type: none"> – As-built drawings never delivered — field changes are lost permanently – Systems training skipped — improper use voids manufacturer warranties – Warranty certificates vague or missing — coverage disputed when you need it – You don't know your rights, your deadlines, or what is already covered 	<p>✓ YOUR REP'S ROLE</p> <ul style="list-style-type: none"> ✓ Confirm all required documentation is in your hands before final payment ✓ Ensure systems training is completed and that it is documented in writing ✓ Organize your warranty file: builder warranty, sub warranties, and key deadlines ✓ Put your 11-month warranty inspection on the calendar before we close the file
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10	<p style="text-align: center; margin: 0;">POST-OCCUPANCY</p> <p style="margin: 0;">11-Month Warranty Inspection</p> <p style="margin: 0;"><i>Month 11 after move-in</i></p>	<p>GC IS RESPONSIBLE FOR</p> <ul style="list-style-type: none"> ◦ Honor the one-year builder warranty on all workmanship and materials ◦ Respond to written warranty claims within the required notice period ◦ Repair or replace all properly documented warranty items ◦ Pass through applicable subcontractor and manufacturer warranties 	<p>△ WITHOUT AN OWNER'S REP</p> <ul style="list-style-type: none"> – Warranty expires with no inspection — coverage is lost permanently – Developing issues are not noticed or not documented before the deadline – Builder disputes coverage — you have no pre-closing documentation as a baseline – Most homeowners never know this window exists until it has already closed 	<p>✓ YOUR REP'S ROLE</p> <ul style="list-style-type: none"> ✓ Schedule a certified inspector one month before the one-year warranty expires ✓ Attend the inspection and observe the findings on your behalf ✓ Review the report with you and advise which items constitute valid warranty claims ✓ Draft the formal written warranty notice to the GC on your behalf
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<p style="font-size: 2em; margin: 0;">28%</p> <p style="margin: 0;">AVERAGE COST OVERRUN</p> <p style="font-size: 0.8em; margin: 0;">Without oversight, a \$6M home typically runs \$1.68M over budget</p>	<p style="font-size: 2em; margin: 0;">3%</p> <p style="margin: 0;">OWNER'S REP FEE</p> <p style="font-size: 0.8em; margin: 0;">Financed within the construction loan as a soft cost</p>	<p style="font-size: 2em; margin: 0;">10</p> <p style="margin: 0;">PHASES COVERED</p> <p style="font-size: 0.8em; margin: 0;">Present and advising from contract signing through warranty</p>	<p style="font-size: 2em; margin: 0;">\$0</p> <p style="margin: 0;">LIABILITY ASSUMED</p> <p style="font-size: 0.8em; margin: 0;">We observe, advise, and advocate. We do not build, inspect, or certify</p>
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Sidd Kashyap · McLean Custom Builders · Independent Owner's Representative · 32 Years · MBA, GWU · (571) 217-2596 · siddkashyapbuilder@gmail.com · 702 E Broad Street, Falls Church, VA 22046