

# PRODUCTION READY PACKET

JOB # \_\_\_\_\_

**SALESPERSON** \_\_\_\_\_

**TURN IN DATE** \_\_\_\_\_

## JOB SOURCE:

**INSURANCE CO.** \_\_\_\_\_

- DOOR KNOCKING LEAD – \$200 FEE
  - TELEMARKETING LEAD – \$100 FEE
  - SELF GENERATED LEAD
  - REFERRAL
  - OTHER

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**CLAIM #**

## SPECIAL NOTES:

H/O NAME

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## ADDRESS

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CITY / ZIP

## **CELL PHONE**

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## HOME PHONE

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## BUSINESS PHONE

Amount Collected \$ \_\_\_\_\_

Collected amount being sent to Aspen via:

- Sales Rep – Mail
  - Sales Rep – Bank Deposit
  - Sales Rep – Office Drop-off

Is the insurance check at the mortgage company?

Yes  No

### Deductible Amount \$

# Project turn-in checklist!!!

Production Ready Packet

Contract

*\*Any and all out of pocket dollar amounts to be paid by homeowner (upgrades and deductible) **MUST** be noted in the contract special instructions box and initialed by homeowner.*

Information sheet

Copy of insurance company paperwork

1st Check Requirements:

A. Insurance Check (Mortgage Company)

- Entire deductible required
- 50% of all out-of-pocket amounts required (upgrades, etc.)

**NOTE:** The entire applicable ACV amount is NOT required in order to turn in the project. However, Aspen will NOT start the construction AND you will NOT be paid until the Entire applicable ACV amount has been received by Aspen. The homeowner MUST immediately and proactively get the insurance check endorsed by their mortgage company AND mailed to Aspen.

B. Insurance Check (NO Mortgage Company)

- Entire applicable ACV amount required
- 50% of all out-of-pocket amounts required (upgrades, etc.)

Trades to be performed sheet

*\*MUST be completed with the homeowner*

*\*MUST be initialed by homeowner*

ITEL roof analysis results form (If applicable)

Product Upgrade Sheet (If applicable)

Digital Picture Requirements:

## Roof

- A. Close-up homeowner name (Must be the 1<sup>st</sup> picture)
- B. Full elevation roof pictures (ALL roof elevations)
- C. Close-up gas stack picture (with tape measure)
- D. Close-up picture of layers (Show the # of shingle layers)
- E. Close-up picture of the roof pitch (with pitch meter)
- F. Close-up fascia panel (with tape measure)
- G. Close-up soffit panel-eave only (with tape measure)
- H. Soffit picture – eave only (from the ground)
- I. Close-up picture of ALL skylights (with tape measure – width & height)(If applicable)
- J. Take pictures of ALL damaged roof accessories

CHECKLIST (Project Turn-In Requirements)

NOTE: All required pictures MUST be uploaded to the GOOGLE DRIVE – SHARED FOLDER immediately following the adjustment.

NOTE: Do NOT scan checks. Write check amount on Production Ready Packet and mail/deposit check.

NOTE: All checklist items MUST be scanned INDEPENDANTLY. Do NOT combine items.

# Aspen Exteriors, Inc.

Corporate Headquarters: 14245 St. Francis Blvd., Suite #101, Ramsey, MN 55303

Office: 763-434-3687 Fax: 763-434-5671

Toll free: 1-866-68ASPEN

## TRADES TO BE PERFORMED

Homeowner name: \_\_\_\_\_ Sales Rep: \_\_\_\_\_

Homeowner address: \_\_\_\_\_

### ROOFING

- A. Insurance Approved Product:  20 year       25 year       30 year  
 Lifetime (Laminated High Grade)       Class IV IR (Laminated Impact Resistant)

- B. Homeowner Selected Product:  20 year       25 year       30 year  
 Lifetime (Laminated High Grade)       Class IV IR (Laminated Impact Resistant)

**NOTE: A & B MUST match, unless homeowner agrees to pay for an upgrade.**

C. Name/Brand: \_\_\_\_\_

D. Color: \_\_\_\_\_

E. List all additional outbuildings to be roofed: \_\_\_\_\_  
(Example: Detached garage, shed, dog house, etc.)

F. List all additional outbuildings not to be roofed: \_\_\_\_\_

G. Install:  Open Valley       Closed Valley

H. Dump and materials to be placed:  Left side of Driveway       Right Side of Driveway

I. Is there drip edge, siders edge, or none: \_\_\_\_\_

If so, what brand/color: \_\_\_\_\_

**NOTE: MUST use correct regional aluminum drip edge color swatch**

J. Are there skylights:  Yes       No

*If yes, you MUST take a close-up picture of ALL skylights (use tape measure – width & height)*

Do the skylights open:  Yes       No      If Yes:  Manual       Remote Controlled

Do any of the skylights have blinds?  Yes       No

K. Is there a satellite dish attached to the shingles:  Yes       No

If yes, choose one:  Detach & reset       Detach & dispose

L. Is Aspen installing any specialty roofing:  Yes       No

If yes, what Type/Color: \_\_\_\_\_

(Example: Type: metal/roll/rubber Color: brown)

Special Instructions: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Initial Here

# **ROOF ANALYSIS** **INFORMATION FORM**

Homeowner name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Phone #: \_\_\_\_\_

Insurance Company: \_\_\_\_\_

Claim #: \_\_\_\_\_

Sales representative: \_\_\_\_\_

Roof (check) \_\_\_\_\_

Aspen Representative Name

Customer Name

## **PRODUCT UPGRADE SHEET**

## **ROOFING UPGRADE**

## **SYNTHETIC FELT UPGRADE**

**TOTAL UPGRADE COST = \$** \_\_\_\_\_

## **EXAMPLE UPGRADE**

Owens Corning      Tru Def Duration  
(Brand)                          (Style)  
30                          \* \$25.00                          = \$750.00  
(Quantity – Replace squares)    (Price)                          (Total)

## Customer Initials

## **ACKNOWLEDGMENT**

I, \_\_\_\_\_, acknowledge and understand that my contract with Aspen Exteriors, Inc. ("Aspen") requires me to personally pay Aspen, out of my own pocket, any and all amounts for required work that is NOT covered by my insurance policy. This includes ACV policies where my insurance policy only covers "Actual Cash Value" amounts rather than "Replacement Cost Value" amounts. In addition, I understand that my contract with Aspen requires me to personally pay for work required by applicable building codes, but not covered by my insurance policy.

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Customer Print

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Customer Signature

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Date

**Thank you for choosing Aspen Exteriors®, Inc. for your home remodeling project. We look forward to starting your project in the near future. To facilitate the ease of the project, please be aware of the following information.**

## **CUSTOMER RESPONSIBILITIES**

**Furnace, Water Heater, and Stove Pipes:** Upon completion of your job, please check ALL interior connections of your furnace, water heater, and stove vent pipes. This includes checking the pipes in your attic. These pipes have a tendency to become dislodged when re-flashing the bases if not originally installed correctly. Since these pipes exhaust carbon monoxide, we strongly recommend having an HVAC certified contractor reconnect the pipes in the attic, as Aspen Exteriors, Inc. is not certified to do this. Any cost incurred will be the responsibility of the homeowner. We will provide free of charge any roofing labor to assist the contractor with his job so that he does not have to double check the seal outside the attic.

**Children and Pets:** Keep children and pets away from the work area. All minors must be accompanied by an adult while the crew is on site. Please inform Aspen Exteriors®, Inc. of any unescorted minors on the premises during the construction process.

**Nails:** Nails which fall from the roof during construction will be picked up with a magnetic nail roller. We will make every effort to pick up most nails. Please be advised, however, that some nails, hidden in the grass or shrubbery, may remain. It is extremely important (especially if you have children or pets) that you look for and pick up any nails that may remain immediately following the completion of your roof. Once the dumpster has been removed, there may be some debris remaining (including nails) where it was placed. Please DO NOT drive on your driveway until you have determined there are no nails left behind.

**Noise and Vibrations:** Be prepared for the noise! There will be constant hammering for one or more days. Remove and/or secure all loose items from wall shelves, walls and ceilings: pictures, plates, figurines, chandeliers, glass globes, etc. Hammering may create vibrations which will shake these items off the shelves or walls.

**Falling Debris and Dust:** Remove ALL items from around the house where roofing debris may fall: patio and pool furniture, potted plants, gardening equipment, etc. Leaves or blooms may be knocked off the plants and/or trees near your home during your job. We try to protect the plants and/or trees but many times the layout of the landscape prevents us from doing so. Also, during a roofing project dust and/or existing roof nails/debris may fall from the rafters and undersides of the decking during tear-off and shingle application. If any decking needs to be replaced, there will be saw dust and/or nails/debris which falls into your attic and/or garage. Any items that this may damage should be moved or protected by the customer PRIOR to the roof installation.

**Satellite Dish:** If your home has a SATELLITE DISH that's attached to your roof and **IS** currently in use, you MAY need to have the dish recalibrated following your roof replacement. During the roof project, Aspen will attempt to remove and reset your satellite dish. However, once your satellite dish is removed and reset/reattached you MAY have a weak signal or no signal at all. This is due to the fact that your satellite dish needs to be recalibrated. It is the customers' responsibility to contact their satellite dish company and schedule a dish reinstallation and/or recalibration upon roof completion. If you incur a cost due to recalibration, then you can submit that cost to your insurance company for reimbursement.

If your home has a SATELLITE DISH that's attached to your roof and **IS NOT** currently in use and you would like your dish permanently removed, you MUST notify the Aspen Exteriors Production Department prior to the start of your roofing project. Once notified, Aspen will remove and dispose of your satellite dish.

**Wiring, Plumbing and Air Conditioning:** Electrical, plumbing, telephone, security, air conditioning and any other service lines by F.H.A. standards should not be installed within 3 inches of the roof deck or exteriors walls. If you are aware of any such lines, you must notify Aspen Exteriors immediately. We cannot be held responsible for the puncture of improperly installed lines within 3 inches of the roof deck or exteriors walls. Occasionally, we will use power tools to cut decking or flashing into brick. When this is necessary, please check your power breakers to make sure that they have not been tripped.

**Solar Panels:** If your home has solar panels attached to the roof, it is your responsibility to have these removed prior to the roof replacement, and reinstalled after the roof replacement. Please schedule your preferred solar panel company to remove the panels and notify Aspen's Production Department of the scheduled removal date at (763) 277-8864 as soon as possible. While we will do our best to schedule the roof replacement as quickly as possible after the solar panel removal, it is important that those removing the solar panels are instructed to seal any holes in the roof after they remove panels. We cannot assume responsibility for any roof leak that occurs prior to Aspen beginning the roof replacement. Solar panel company MUST remove all brackets that are attached to the roof, as these brackets are designed to be mounted to the surface of the shingles. Aspen will not install shingles around solar panel brackets. Please ensure that you hire a reputable solar panel company as we cannot assume responsibility for any roof leak caused by the installation or re-installation of solar panels.

## **PERMITS & INSPECTIONS**

Building permits will be posted outside your home and accessible to the city inspector. This card must remain posted OUTSIDE the home, until a building official from your city has signed off on this permit under "final inspection" approved. Some cities require more than one inspection which is why it is crucial to make sure the building official has signed off under "final inspection". Once this is done, the card can come down and the homeowner can keep this for their personal records. Aspen does not require a copy of this card.

## **PROJECT SCHEDULING**

An Aspen representative will contact you before the start of each construction trade being performed to make you aware of the anticipated start date. Please inform us of any possible conflicts as soon as possible by calling the Production Department @ 763-277-8864. All exterior work is performed on a "weather permitting" basis. For example: If it rains for two days prior to your anticipated start date, then these rain days can delay the start date of your project. We will keep you updated on schedule changes as they arise.

For each day that it rains, work on your home will likely be delayed. Aspen construction crews are instructed to only remove what they can re-cover the same day, so that your property is always protected from inclement weather. In most cases this means the crew will re-shingle all areas they have removed the same day, but oftentimes some areas may be left overnight with underlayment exposed. Roofing underlayment is waterproof, and is approved to be left exposed for up to 6 months, depending on the specific product installed. If your city requires a physical inspection of the roofing underlayment, the roof may be covered with only underlayment for a longer period, depending upon the availability of a building inspector. In some cases, tarps may be used as added protection against the elements until the weather/inspector allows the crew to resume work.

*continued on reverse side*

I have received, read, and completely understand the "Customer Project Timeline Diagram" \_\_\_\_\_  
(initial)

**The terms on the reverse side hereof are specifically agreed to and incorporated herein. By signing this form, you are agreeing that the above listed information has been explained to you and a copy has been provided.**

Homeowner's Signature \_\_\_\_\_ Date \_\_\_\_\_

Email (required) \_\_\_\_\_

## **MATERIALS & DUMPSTER**

Materials and dumpsters usually arrive 1-3 days before a project is scheduled to begin. When shingles/siding are delivered to your home, please check the color. Notify Aspen Exteriors®, Inc. immediately if the color is not what you ordered. To avoid additional charges, do not put anything in the dumpster. The dumpster will be removed from your property within a week of completion of your project. Once the dumpster has been removed, there may be some debris remaining (including nails) where it was placed. Please DO NOT drive on your driveway until you have determined there are no nails left behind. Aspen Exteriors®, Inc. is not responsible for any tire replacement or repair costs. Also, nails which fall from the roof during construction will be picked up with a magnetic nail roller. We will make every effort to pick up most nails. Please be advised, however, that some nails, hidden in the grass or shrubbery, may remain. It is extremely important (especially if you have children or pets) that you look for and pick up any nails that may remain immediately following the completion of your roof.

**Important information:** We will need access to your driveway to discard shingles and clean up. Please park your cars, motorcycles, bicycles, boats, etc. away from the driveway the day or days of construction. In addition to needing access to your driveway we will also need access to electricity. If there are no plugs available, then please run an extension cord through a window or under a door. Also, in very rare cases, if the driveway was not built properly you might develop cracks from the weight of the dumpster or delivery trucks. This is the fault and failure of the company who installed your driveway improperly. If this happens, we cannot assume responsibility for the damages. This is a very rare occurrence, but has been known to happen.

**Leftover Material:** Our proposals are based upon a complete job. Any left-over materials remain the property of Aspen Exteriors, Inc. We customarily over ship a small quantity to insure adequate supplies for our crews. Left over material will be picked up by the supply company.

## **UNAVOIDABLE OCCURENCES**

*Aspen is NOT responsible for these unavoidable occurrences*

**Gutter Damage:** Precautionary measures are taken to prevent gutter damage. However, there are instances when damage to gutters is unavoidable, especially on very steep roofs, roofs that are completely surrounded by gutters or on homes that have very old gutters. *Aspen Exteriors cannot be held responsible for this unavoidable occurrence.*

**Shingles Sealed to Sidewalls:** Occasionally, shingles have been sealed to the sidewalls. Age, along with moisture, can rot the wood. During the removal of shingles along walls and installing of new flashing, paint removal and chipping of the wood may occur. *Aspen is not responsible for this unavoidable occurrence.*

**Multiple Shingle Layers:** When we remove two or more layers of shingles from the roof, your roof line will drop. This will be evident along any wall which meets your roof. The change in appearance will not affect the integrity and utility of the roof and flashing. *Aspen is not responsible for this unavoidable occurrence.*

**Shingle Weight:** When the old roof is removed, a tremendous amount of weight is taken off the frame and rafters of your home. This can cause slight expansion of your rafters and supporting walls. This expansion may cause small stress cracks in your ceiling along with paint popping off nail heads. *Aspen is not responsible for this unavoidable occurrence.*

**Roof Sagging, Waves and/or Bubbling:** Sagging, waves and/or bubbling in the decking will NOT be corrected with standard re-roofing. In addition, multiple layer tear-off will magnify these imperfections in the decking. These types of issues are usually aesthetic only and do not compromise the structural integrity of the home. *Aspen Exteriors is not responsible for this unavoidable occurrence.*

## **BILLING**

**Supplements:** On nearly every insurance claim, there will be a supplement request made by Aspen to your insurance company. Supplements are additional funds requested by Aspen for items that may have been missed on the original insurance claim summary or pricing mistakes made by your insurance company. Some examples of missed items may include, but are not limited to the following: **1) Additional squares of roofing or siding.** If the original adjuster didn't measure the property properly additional squared will need to be added. **2) Permits.** Often times permits are not included in the original insurance company paperwork and will need to be added as a supplement. **3) Dumpsters.** Dumpsters are another item that may have price fluctuations, therefore, the insurance company will usually reimburse the contractor after this cost is incurred. **4) Pricing mistakes.** An example of a pricing mistake for instance, may be the amount an insurance company is paying to replace a window. They may allow \$300 to replace a window, when the cost of the window alone (not including labor) may exceed this amount. In a case like this, prices need to be negotiated to replace the item in question with a more realistic price.

**Insurance Company Checks:** Most insurance company checks are made payable not only to the homeowner, but also their mortgage company. In most cases, federal or state agencies require insurance companies to do this. If you receive your insurance payment made payable in this manner, it is THE HOMEOWNERS responsibility to contact their mortgage company to find out what is required of them to get these checks endorsed. Liquidation of these funds should be an IMMEDIATE priority for all homeowners. Mortgage companies may also require that an agent from their company come to the homeowners' house to verify that all work paid for by the homeowners' insurance company has been completed. This too is THE HOMEOWNERS responsibility to schedule this inspection with their mortgage company.

**Payments and Credits:** All payments and credits will be indicated on your invoice.

### **Replacement Cost Value, Depreciation, Actual Cash Value, and Depreciation:**

**Replacement Cost Value (RCV):** This is the total amount of the project per insurance company approval. This is often the largest amount on your insurance claim summary. This amount STILL HAS YOUR DEDUCTIBLE included in it. The Replacement Cost Value (RCV) will be broken out into two different amounts. They are Actual Cash Value (ACV) and Depreciation. The sum of these two amounts equals the Replacement Cost Value.

**Depreciation:** This is the amount of money your insurance company is going to withhold until the project is completed. The Depreciation is based solely on how old your damaged items are at the time the damage occurred. The older the item is, the more your insurance company will withhold. In most cases this depreciation holdback amount is recoverable.

**Actual Cash Value (ACV):** This is the amount left over out of your Replacement Cost Value (RCV) AFTER the Depreciation has been taken out.

**Deductible:** The insurance company will remove the Deductible amount from the Actual Cash Value (ACV) amount. The remaining amount is the total of the FIRST check you receive. NOTE: The reason your deductible amount is removed from the Actual Cash Value (ACV) amount is because it is YOUR responsibility to pay the deductible portion out of your own pocket to the contractor. The insurance company does NOT pay your deductible.

**NOTE:** Upon completion of a project the depreciation holdback amount will be released to you by the insurance company. Below is an example based on a roof with a Replacement Cost Value of \$10,000.00

Replacement Cost Value (RCV) = <b>\$10,000</b>		
	<b>Actual Cash Value (ACV) = \$6000</b>	<b>Depreciation (2<sup>nd</sup> insurance check) = \$4000</b>
<b>Deductible (Homeowners responsibility to pay) = -\$1000</b>		
<b>1st insurance check = \$5000</b>		

At Aspen Exteriors®, Inc. our #1 goal is a satisfied customer. We hope that by making you aware that these certain unavoidable occurrences are a standard component of a remodeling job, you will not have any unpleasant surprises and you will become yet another satisfied Aspen Exteriors®, Inc. customer. Do not hesitate to call us if you have any concerns or questions before, during, or after the construction process. Again, thank you for choosing Aspen Exteriors®, Inc.

# **IMPORTANT INFORMATION**

## ***DOWN PAYMENT REQUIREMENTS***

You MUST provide a down payment to your sales representative.

The following lists your down payment requirements and instructions:

1. If there **IS** a MORTGAGE COMPANY listed on your insurance check, then ...

- ✓ ENTIRE deductible REQUIRED
- ✓ 50% of ALL out-of-pocket amounts REQUIRED (upgrades, etc.)

**NOTE:** The entire applicable ACV amount is NOT required in order to turn in the project. However, Aspen will NOT start your construction project until the ENTIRE ACV amount has been received by Aspen. The homeowner MUST immediately and proactively get the insurance check endorsed by their mortgage company AND mailed to Aspen at: 14245 St. Francis Blvd. (#101) Ramsey, MN 55303. If you need assistance liquidating your check, then contact the Aspen Exteriors Office Manager @ 763-277-8860.

2. If there is **NOT** a MORTGAGE COMPANY listed on your insurance check, then ...

- ✓ ENTIRE applicable ACV amount REQUIRED
- ✓ 50% of ALL out-of-pocket amounts REQUIRED (upgrades, etc.)

**OR**