



**WILLIAMSREALTYGROUP**  
**10412 Allisonville Road, Suite 200**  
**Fishers, IN 46038**  
**317-574-5480 Office**  
**317-829-2052 Fax**  
[www.wr-group.com](http://www.wr-group.com)

## **Site Analysis Phase III**

- Contract to Purchase
- Action Points

### **Procedural:**

Once site is accepted by Williams Realty Group, CTP (contract to purchase form to be filled out by local broker) and a Letter of Intent and/or contract shall be generated by Williams Realty Group and submitted to local broker for submittal to Seller. All contract negotiations shall be performed directly with Seller and Williams Realty Group and counsel. Once property is under contract, Williams Realty Group is to enter into due diligence phase (see Due Diligence procedural). Projects shall be assigned a Development Project (DP) Number which shall be referenced on all forms and procedures regarding development and communication of the site from contract date forward.



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**PHASE III  
CONTRACT TO PURCHASE  
ACTION POINTS**

**PROJECT NAME:** \_\_\_\_\_ **DP#:** \_\_\_\_\_

**PREPARED BY:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**PURCHASER/SELLER INFORMATION:**

I. PURCHASERS NAME: \_\_\_\_\_

PURCHASERS ADDRESS: \_\_\_\_\_

SELLERS NAME: \_\_\_\_\_

SELLERS ADDRESS: \_\_\_\_\_

**LAND INFORMATION:**

I. PARCEL NUMBER(S): \_\_\_\_\_

ADDRESS: \_\_\_\_\_ CITY: \_\_\_\_\_

STATE: \_\_\_\_\_ COUNTY: \_\_\_\_\_

ACREAGE: \_\_\_\_\_ LAND TYPE: \_\_\_\_\_

PURCHASE PRICE: \$ \_\_\_\_\_ EARNEST MONEY: \$ \_\_\_\_\_

**PURCHASE AGREEMENT INFORMATION:**

- I. DURATION OF OFFER: \_\_\_\_\_
- COOPERATING BROKER(S) \_\_\_\_\_
- TAXES PRORATED: YES: \_\_\_\_\_ NO: \_\_\_\_\_
- DATE CONTRACT EXECUTED: \_\_\_\_\_
- LENGTH OF EXAMINATION PERIOD: \_\_\_\_\_ DAYS
- END OF EXAMINATION PERIOD: \_\_\_\_\_
- DAYS TO CLOSE AFTER EXAMINATION PERIOD: \_\_\_\_\_
- CLOSING DATE: \_\_\_\_\_

**ZONING:**

- 1. CURRENT ZONING: \_\_\_\_\_
- 2. TO BE RE-ZONED: \_\_\_\_\_
- 3. ANTICIPATED LENGTH OF PROCESS: \_\_\_\_\_

**DUE DILIGENCE:**

- I. DATE TITLE ORDERED: \_\_\_\_\_
- FROM: \_\_\_\_\_
- DATE TITLE RECEIVED: \_\_\_\_\_
- DISTRIBUTED TO: LEGAL \_\_\_\_\_  
DEVELOPER \_\_\_\_\_  
ENGINEERING FIRM \_\_\_\_\_  
GILMAN \_\_\_\_\_
- 2. DATE SURVEY ORDERED: \_\_\_\_\_
- FROM: \_\_\_\_\_
- DISTRIBUTED TO: LEGAL \_\_\_\_\_  
CIVIL ENGINEER \_\_\_\_\_  
CONSTRUCTION \_\_\_\_\_  
GILMAN \_\_\_\_\_  
DEVELOPER \_\_\_\_\_

3. DATE ENVIRONMENTAL ORDERED: \_\_\_\_\_

FROM: \_\_\_\_\_

DISTRIBUTED TO:	LEGAL	_____
	CIVIL ENGINEER	_____
	CONSTRUCTION	_____
	GILMAN DEVELOPER	_____

4. DATE GEOTECH ORDERED: \_\_\_\_\_

FROM: \_\_\_\_\_

DISTRIBUTED TO:	LEGAL	_____
	CIVIL ENGINEER	_____
	CONSTRUCTION	_____
	DEVELOPER	_____

**SITE PLAN/ZONING**

1. DATE CAPITOL SITE REVIEW REQUESTED: \_\_\_\_\_

DATE CAPITOL SITE REVIEW COMPLETE: \_\_\_\_\_

DATE SITE REVIEW WITH COMMENTS  
REVISED: \_\_\_\_\_

2. FIRST MEETING WITH ZONING/PLANNING: \_\_\_\_\_

BY: \_\_\_\_\_

SURVEYOR: \_\_\_\_\_

BY: \_\_\_\_\_

UTILITIES: \_\_\_\_\_

BY: \_\_\_\_\_

**COMMENTS/SPECIAL ADDITIONS:**

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PRELIMINARY (WHITE) BUDGET

COMPLETED: \_\_\_\_\_

APPROVED: \_\_\_\_\_

RETAIL: \_\_\_\_\_

DEVELOPMENT: \_\_\_\_\_

CONTRACT (PINK) BUDGET

COMPLETED: \_\_\_\_\_

APPROVED BY: \_\_\_\_\_

DAC

CLOSING (GREEN) BUDGET

COMPLETED: \_\_\_\_\_

APPROVED BY: \_\_\_\_\_

DAC

## FILE SET UP

CAPITOL CONTRACT	CAPITOL CORRESPONDENCE
CAPITOL PRICING BACK UP	STATE RELEASE
BUILDING PERMIT	CAPITOL RFI'S
*NOTES	NOTES
*BUDGETS	PROFORMAS
*SCHEDULES	PROJECT SCHEDULE
SHELL CONSTRUCTION SCHEDULE	WHITE BOX SCHEDULE
*DUE DILIGENCE	AS-BUILTS
*SITE ACQUISITION	PURCHASE AGREEMENT
RENDERINGS	CCR'S
ESTIMATES	*FINANCING
APPRAISAL	FINANCING ESTIMATES
TITLE INSURANCE	PURCHASE INFORMATION
PRELIMINARY SITE PLANS	PHASE I PROPOSALS
PHASE I ASSESSMENT	*CLOSE OUT DOCUMENTS
WATER FEES & APPROVALS	SANITARY SEWER FEES & APPROVALS
DRAINAGE REPORT	POWER COORDINATION
TELEPHONE COORDINATION	CABLE COORDINATION
*UTILITIES	*ARCHITECTURAL
ARCHITECTURAL CONTRACT	ARCHITECTURAL ADDENDA
ARCHITECTURAL CORRESPONDENCE	*CIVIL ENGINEER

## FILE SET UP CONT'D.

*GEOTECHNICAL ENGINEER	CIVIL CONTRACT
CIVIL CORRESPONDENCE	CIVIL ADDENDA
GEOTECHNICAL CONTRACT	GEOTECHNICAL REPORTS
*MATERIAL TESTING	MATERIAL TESTING REPORTS
CIVIL TRANSMITTALS	ARCHITECTURAL TRANSMITTALS
GEOTECHNICAL PROPOSALS	*COUNTY
COUNTY COMMENTS	COUNTY DRAINAGE COMMENTS
COUNTY INFORMATION & FORMS	COUNTY FEES/APPROVALS
COUNTY CORRESPONDENCE	CAPITOL CONSTRUCTION
CERTIFICATE OF OCCUPANCY	WARRANTIES
AS-BUILTS	SUBSTANTIAL COMPLETION FORM