

**CITY OF MONROE
DOWNTOWN ADVISORY BOARD MEETING
300 W. CROWELL STREET
MONROE, NORTH CAROLINA 28112
Wednesday, February 19, 2025
- 9:00 AM
AGENDA**

1. Call to Order
2. Roll Call
3. Approval/Acceptance of January 24, 2025 Minutes (Action Required)
4. Mural Ordinance Discussion - Presented by Terry Sholar
5. Retail Promotions Sponsorship Application for Spring Fest 2025
6. Economic Development PRONTO and Blade/Suspension Grant for Matthew Wilson, owner Patty and the Dogs
7. Economic Development Incentive Meet Me Downtown Grant for The Presson Art Gallery
8. Downtown Economic Development Residential Incentive Grant – Gateway Development, James Scott Purdy
9. Adjourn Meeting (Action Required)

ATTENTION ADVISORY BOARD MEMBERS: Please contact Donna O'Keefe at 704-292-1705, Ext. 6040 to confirm your attendance. Thank you.

**AS A COURTESY, PLEASE TURN OFF ALL MOBILE DEVICES WHILE MEETING IS
IN PROGRESS.**

CITY OF MONROE
DOWNTOWN MONROE ADVISORY BOARD MEETING
300 W CROWELL STREET, MONROE, NC 28112
January 24, 2025
MINUTES

DAB Members: Chair: Joyce Rentschler, Courtney Garrison, William Heisner, Clint Lawrence, Lisa Boix, and Greg Moore were all present.

Staff Present: Jeff Wells, Assistant City Manager; Lisa Hollowell, Assistant City Manager; and Terry Sholar, Staff Attorney

Visitors Present: Mike Jones, Karyl Jones, and Jason Hill

Member(s) Absent: Sheila Crunkleton was absent. None

The Downtown Monroe Advisory Board met on January 24, 2025 at 9:00 a.m.

Item 1: Call to order

Joyce Rentschler called the Tuesday, **January 24, 2024** Downtown Advisory Board Regular Meeting to order at 9:00 a.m.

Item 2: Roll Call

Roll was documented by Donna O'Keefe.

Item 3: New board Member Introduction and Review of Board Duties

Donna O'Keefe, Downtown Manager welcomed the new board. Clint Lawrence began the introductions and shared that he owns a surveying company that is located in the old Monroe Police Department building. Next to introduce themselves was Greg Moore. Greg is the owner of Home Brew on Main Street. Next, Joyce Rentschler introduced herself as the Board Chair and shared that she is a lifetime and current resident of the City. Next, William Heisner, introduced himself and shared with those present that he owns a real estate and development business as well as several buildings downtown including the building where American resides. Next was Lisa Boix, she shared that she is the owner of Main Street Bistro. Last was Courtney Garrison, she owns Superior Home Medical and Boutique on Main. Ms. Garrison also shared with the Group that she is very excited and honored to serve and is looking forward to it.

Item 4 Legislative Agenda Discussion

Donna O'Keefe opened this item. She reminded the board that they had been asked to share their ideas for the 2025 Legislative Agenda. Ms. O'Keefe reviewed two possible ideas via a power point and provided to the board copies in their agenda binder. The first was a possible Piazza, Pocket Park, Central Square or Green space that could be added at the center of Main Street. This project idea would reduce parking but bring beatification across from the Morgan/Windsor Alley and the Downtown Offices. An image of a similar project was shared. The second idea presented by Ms. O'Keefe was a Food Hall and Market. This type of project could serve as a small business educational opportunity and business incubator similar to the Market at 7th Street in Charlotte. Sample photos were shared with the board. Ms. O'Keefe introduced Lisa Hollowell, Assistant City Manager to

continue the Legislative Discussion. Ms. Hollowell reviewed points from her December presentation to this board and asked if the board had any ideas that they would like added to the list. There were no additional ideas shared. Ms. Hollowell invited the board to give any ideas to the Downtown Manager by the end of January.

Item 5: Approval of December 16, 2024 Minutes

Joyce Rentschler, introduced the item

Motion: William (Bill) Heisner made a motion to approve the December 16, 2024 Minutes of the Downtown Advisory Board Special Meeting.

Second: Lisa Boix

Action: The motion to accept the December 16, 2024 minutes as submitted was passed unanimously.

Item 6: Morgan/Windsor Alley Furnishings Presentation (Action Required)

Joyce Rentschler introduced this item

Donna O'Keefe presented the proposed alley furnishing packet. The packet was presented via Power Point and provided to Downtown Advisory Board in their agenda packet binder. The color, design and placement was reviewed. A request for approval from the Downtown Advisory Board was requested so that the project could move to General Services on Feb 6, 2025, and City Council on Feb 11, 2025. These dates are important due to lead time and delivery by May.

Joyce Rentschler requested a motion.

Motion: Courtney Garrison made a motion to accept the Morgan/Windsor Alley Furnishings Proposal as presented, and recommend the proposal to the General Services Committee.

Second: Greg Moore

Action: The motion to recommend approval of the Morgan/Windsor Alley furnishings passed unanimously.

Item 7: Economic Development PRONTO Incentive Grant for Clippers

-
Joyce Rentschler introduced this item

Donna O'Keefe presented this item. Clipperz owners Mike and Karyl Jones have entered into a lease agreement for 215 E. Franklin Street to open a new retail business. The new business project totals 1383 Square ft. and is located within Downtown Monroe's Central Business District. Ms. O'Keefe explained that based on stipulations of the PRONTO Economic development incentive grants the Downtown Advisory Board was asked to consider -Rent Subsidy and Up-Fit Assistance not to exceed \$8598.

- a) Rent Subsidy: \$3.00 per square foot leased/purchased for retail use for a 12 month period. This business is 1383 sq. ft. which allows a maximum of **\$4299** payable quarterly over a year. Payment of Rent Subsidy funds shall be made by City of Monroe to approved applicants at the end of each calendar quarter based on rent

paid that quarter. Proof of timely payment of the full amount of rent will be required before Rent Subsidy funds are released.

b) Up-Fit Assistance: \$3 per square foot (1383 sq. ft.) for Up-Fit Assistance up to **\$4299** payable in one-third increments annually for three years as long as the business continues to meet the qualifications for assistance. The initial payment (Payment1) shall be made within 30 days of the submittal and approval of paid invoices for up-fit expenses. Payments 2 and 3 shall be made at the anniversary date of the business opening of year 2 and 3 at the request of the grantee.

Staff requests the Downtown Advisory Board make a motion to recommend approval of the economic development incentive grant to City Council. The Chair, Joyce Rentschler called for a motion.

Motion: William Heisner made the motion to approve and recommend the PRONTO Economic Development Incentive Grant for Clipperz to City Council.

Second: Lisa Biox

Action: The motion to recommend approval the PRONTO Incentive Grants for Clipperz passed unanimously.

Item 3: (Continued) Review of Board Duties

Mr. Terry Scholar, staff attorney spoke to the new and existing Downtown Advisory Board Members about the board and their role on the board. He covered meeting, attendance, terms, and the general duties of the Downtown Advisory Board. Mr. Scholar explained the board is an "advisory" board and serves to provide City Council with recommendations on many items including grants, and other downtown projects. He explained that board members that are absent more than three consecutive meeting will be subject to replacement. He also explained Conflict of Interest. If a member of the board is making a decision that could benefit their own financial interest, that member should bring this to our attention.

Item 8: Economic Development PRONTO Incentive Grant, Façade Grant, an Meet me Downtown Grant for E.L.K.'s, Jason Hill

Joyce Rentschler introduced this item. Donna O'Keefe presented this item.

Jason Hill has entered into a 10 year lease with AWB & Associates for a restaurant space at 301 E. Franklin Street the old trophy building that was also a gas station. ELK of Monroe will be a new restaurant located in the central business district of Monroe.

It is the recommendation of Staff that the Downtown Advisory Board recommend the downtown incentives as outlined with the following stipulations:

1. Grant funds for the **PRONTO Incentive Grant** not to exceed \$10,000. Donna O'Keefe explained that Elks is eligible for \$6875 in Up-fit assistance as well as \$6875 in Rent Subsidy assistance as offered through this program to support retail and restaurants

with up-fit and rent assistance. Due to the maximum grant amount of \$10,000 Elks has elected to request \$6875 in Up-Fit assistance and \$3125 in Rent Subsidy.

- a) \$6875 Up-Fit assistance- Elks will be a 1375 sq. ft. restaurant, and is eligible for \$5 per sq. ft. in up-fit assistance payable over a three (3) year period in one-third increments. This project is planned to be completed in 2025.
 - b) \$3125 Rent Subsidy – Elks is eligible for \$5 per sq. ft. or up to \$6875 in rent subsidy. This amount must be reduced due to the \$10,000 maximum assistance offered through the PRONTO Grant Incentive Program. Rent subsidy is payable at the end of each quarter for 1 year. Proof of payment of the full amount of rent is required before funds are released.
2. Grant funds for the **Façade Incentive Grant** not to exceed \$4000. Grant funds for the Façade Incentive Grant are awarded on a 50-50 matching basis not to exceed \$4,000 per façade facing a public street. Mr. Hill application meets the special exception (d) in the grant guidelines as eligible for and additional FIG as a new business that requires changes to the building façade.
3. **Meet Me Downtown Incentive Grant** for the marketing and advertising. This is a 50-50 matching grant with maximum funding of up to \$5000. Elks is making a significant new investment in Downton as a new eligible business. New businesses opening in downtown may apply for up to 50% of the per business cost of their current advertising and marketing budget. The cost of any approved advertising and marketing will be reimbursed to the business following the submission of an invoice and proof of payment, and verification the vendor has received payment.

Staff requests Downtown Advisory Board recommend the approval of the PRONTO Incentive Grant Council with the Resolution and Budget Amendment to appropriate funds of \$10,000

Staff recommends approval of the Façade Incentive Grant up to the maximum of \$4,000. Funding is subject to compliance with the Program and subject to a general fund appropriation

Staff recommends approval of the Meet Me Downtown Program Incentive up to \$5000. Funding is subject to compliance with the program and subject to a general fund appropriation.

Motion: Greg Moore made the motion to approve and recommend the PRONTO Economic Development Incentive Grant, Façade Grant and Meet Me Downtown Incentive Grant for ELKS's to City Council.

Second: Clint Lawrence

Action: The motion to recommend approval the PRONTO Incentive Grants for Clipperz passed unanimously.

Item 6: Adjourn (Action Required)

Motion: Joyce Rentschler moved to adjourn.

Second: William Heisner

Action: The motion to adjourn passed unanimously.

The meeting adjourned at 10:05 a.m.

DRAFT

**AN ORDINANCE AMENDING
TITLE XV OF THE
CODE OF ORDINANCES
OF THE CITY OF MONROE
O-2025-**

**BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF MONROE THAT
TITLE XV OF THE MONROE ORDINANCES CREATE AND ADD CHAPTER 160:**

TEXT AMENDMENT

Section 1. Create new Title XV, Chapter 160, add new Section 160.04 Murals in Downtown to read as follows:

160.04 Murals In Downtown District. Murals are permitted in the Downtown District as defined in Section 160.01 herein as follows:

- A. Public Policy and Purpose.** The Monroe City Council finds that the painting of art or murals on buildings located in the Downtown District can enhance the quality of life, vitality, and appearance of Monroe's Downtown. Murals are a form of public art in that they are by design intended to be public displays. Therefore, the commissioning, painting, and maintenance of public art as murals in the Monroe Downtown District should be carried out on behalf of the public only by the City of Monroe based upon stringent guidelines utilizing a well-designed process involving public input and approval by Monroe City Council.
- B. Definitions.** The following definitions shall apply in this Section:
1. Mural – A picture or design painted on or otherwise attached to an exterior surface of a structure.
 2. Sign – A picture or design clearly related by language, logo or pictorial depiction to a business or advertisement of any product or service of any business. Such Signs are not Murals and are regulated as a sign by the sign provisions of the Monroe Unified Development Ordinance.
 3. Private Mural – Any Mural as defined herein commissioned with or without consideration for painting or attachment to the exterior of a structure by a private individual or entity.
 4. Public Mural – Any Mural commissioned through the City of Monroe Downtown Mural Policy and approved by Monroe City Council.
- C. Private Murals Prohibited.** The commissioning and painting or attaching Private Murals is hereby prohibited in the Downtown District defined in Section 160.01.

D. Public Murals. Only Public Murals commissioned by the City of Monroe in accord with the procedures set out in the City of Monroe Downtown Mural Policy which are incorporated herein are allowed in the Downtown District.

E. Enforcement.

1. Civil Enforcement. The Monroe City Manager is authorized to appoint and designate one or more Enforcement Agent(s) to enforce the provisions of this ordinance. Any Mural in the Downtown District observed violating any provision of this ordinance and upon written Notice of Violation by a duly appointed City of Monroe Enforcement Agent is subject to the following civil penalty in the following amounts:

First Citation	\$250.00
Second Citation For Same or Similar Violation	\$500.00

Upon issuance of a notice of violation of this ordinance, the owner of the building on which the Mural is painted or attached shall have thirty (30) days from the date of the Notice of Violation to remove the Mural.

Notices of violation of this ordinance shall be in writing and may be served by personal delivery to the building owner or served by US Mail addressed to the owner of the building as shown on the Union County tax records. Service is complete upon personal delivery or depositing the notice by first class United States Postal Services mail.

2. Injunction and Abatement. If the building owner fails to remove a Mural that is the subject of a Notice of Violation within the time provided above, the City may apply to the General Court of Justice seeking an injunction and order of abatement pursuant to North Carolina General Statute 160A-175(c). Upon failure of the building owner to comply with the order of the court, the City may abate the violation and cost assessed as a lien against the property as provided by state statute.

3. Appeal. A Notice of Violation of this ordinance may be appealed for a hearing by the building owner upon written notice to the City of Monroe with ten (10) days of receipt of the Notice of Violation. Upon receipt of a notice of appeal, the City Manager and/or their designed Hearing Officer shall schedule a hearing to be held within thirty (30) days of receipt of the notice of appeal. The building owner shall be sent written notice of the date and time of the hearing. The City Manager and/or their designated Hearing Officer shall conduct the hearing during which the building owner shall be given an opportunity to offer evidence or testimony regarding the violation. After conclusion of the hearing, the City Manager and/or their designed Hearing Officer shall make a written determination and provide copies to the building owner. The written decision of the City Manager and/or their designed

Hearing Officer is final and no additional administrative appeals are available. Appeal of the Notice of Violation issued pursuant to paragraph E above shall stay the removal requirement pursuant to E.1. above until the date the written hearing determination letter is mailed to the building owner. If the Violation is upheld as a result of hearing, the building owner shall have thirty days from the date of mailing the notice of violation to remove the Mural.

Section 2. This ordinance shall be effective upon adoption.

Robert A. Burns, Mayor

ATTEST:

Bridgette H. Robinson, City Clerk



STAFF REPORT

TO: Downtown Advisory Board

VIA: Jeff Wells, Assistant City Manager

DATE: February 11, 2025

FROM: Donna O'Keefe, Downtown Manager

SUBJECT: Monroe Spring Fest 2025, Sponsorship Application

SUMMARY STATEMENT

BelaNature's owner Sandra Murschel has submitted a sponsorship application on behalf of Home Brew Tap Room and Tunes owner Greg Moore for the Monroe Spring Fest 2025

REVIEW

The Monroe Spring Fest is an event put on by downtown Monroe business owners to bring people into Downtown Monroe for one day. The event closes the majority of Main Street to allow for food & retail vendors and fun activities for kids and adults alike. There will be at least 10 downtown businesses willing to participate in this event and will be open during the event.

The event is scheduled for the April 12, 2025 from 11 am to 5 pm.

Please see application for further details on marketing plan, pre-event plan, and vendor list.

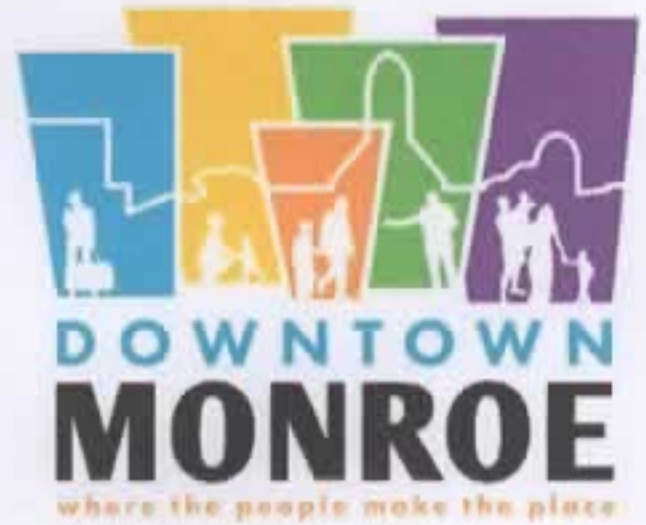
RECOMMENDATION

In order to form a sponsorship plan, which encompasses a fair policy, the Downtown Office has appropriated funding towards these endeavors. The appropriation can fund up to one event each quarter and one application per event each fiscal year, not the exceed \$500. This is the first application submitted for the Q3 of FY25.

Attachment(s):
Sponsorship Application

Retail Promotions Sponsorship Application

The City of Monroe Downtown pursues an ever growing economic development initiative which emphasizes the need for new and exciting places, events, and people. If you have an event you feel could have a positive impact on the growth of Downtown, we want to help make that dream become a reality. Listed below are questions the City must consider to sponsor an event in Downtown:



All questions must be answered "Yes" for consideration

	Yes	No
Is your business within the Central Business District?	✓	
Will the event produce a positive impact on the Downtown Monroe Community and coordinate well within the existing promotions calendar?	✓	
Will the event encourage visitors to shop at the event and surrounding downtown businesses? (including street closures and new traffic/pedestrian patterns)	✓	
Will the event have the financial support necessary to carry out operations of the event or will it require additional funding sources?	✓	
Does the event generate enough interest to draw in people from within the City of Monroe and the surrounding area?	✓	
Are all Downtown businesses offered to participate?	✓	
Are there at least 10 Downtown, retail and/or restaurant businesses participating? (Please Provide a List)	✓	
Will the event occur within the Central Business District?	✓	

Please note that the sponsorship may not exceed \$500 per event and funds are limited to one per quarter. A person(s) may only apply for one sponsorship per year. The Downtown Advisory Board has the final decision on where these funds are to be allocated.

Contact Information

Name of Person Submitting Event: *Sandra Murschel, Bela Nature, on behalf of Greg Moore, Home Brew Taproom + Tunes*
Email: *belanaturenc@gmail.com* Phone Number: *630-267-3007*
homebrestaproom@gmail.com *980-215-3564*

Description of Event

Event Name: *Monroe's Spring Fest 2025*

Brief Description below or add attachment:

Street Closures on Main Street ; Vendors, Music and other entertainment ; Food Trucks.
Public will also be able to shop + dine in downtown businesses and restaurants

What month(s), day(s), and time of the week do you see the event taking place?

Saturday, April 12, 2025
11am to 5pm

How often do you propose the event will take place? *every Spring + Fall*

Is there a direct way to tie this event to the Downtown Monroe businesses? Explain:

Downtown businesses will benefit from having the public come out to the festival - it will give them exposure + sales.

Marketing

Who is the target market for this event? *Residents of Monroe + surrounding areas + visitors*

Core message of the campaign: *Fun for the whole family; opportunity to shop local*

Please describe how this event would be promoted.

The event will be promoted thru businesses + vendors social media. Posters will be printed + displayed in downtown businesses + other local businesses. Fast Signs, thru sponsorship, is providing us with loan signs to be placed in various visible locations.

Below describe each method of promotion in detail.

Medium or Channel	Length of Time	Start Date of Promotion	Specific Target Group
<i>Social Media (FB, Insta, Websites...)</i>	<i>Current to day of Event</i>		<i>Local community + surrounding areas</i>
<i>Posters</i>	<i>Will be printed + displayed in February</i>		
<i>Loan Signs</i>	<i>"</i>	<i>"</i>	

Pre-Planning Management

Please describe the steps involved in the actual pre-planning process- where, when, hours and time, activities involved, groups who will participate in planning.

Home Brew Taproom + Tunes and Bela Nature are the main planners, with support from other downtown businesses. Home Brew is planning music, entertainment + getting city permits. Bela Nature is securing vendors and communicating with them.

Food: ☒ YES ☐ NO Will the food be: ☐ GIVEN AWAY ☒ SOLD (County Permit Required if YES)

Food Trucks

*Will the event require street or parking lot closings? ☒ YES ☐ NO (City Permit Required if YES)

NOTE: If yes, please provide a map showing which streets will need to be closed & exactly where barricades will need to be located.

Permit request + info already submitted by Home Bros

*Will the event require a tent or temporary structure? ☒ YES ☒ NO (City Permit Required if YES)

*What is the square feet of the tent or temporary structure?

*Will the tent structure be used by 10 or more occupants? ☐ YES ☐ NO

NOTE: Building and fire permits are required for tents or other temporary structures erected for a period of less than 180 days and that has an area greater than 120 square feet or is to be used by 10 or more occupants.

Please describe in detail the labor needs on the day of the event. This could range from security, volunteers to clean up.

Barriers for street closure will be needed to be dropped off.

Funding

Please give a budget for expenses related to this event. Attach separate sheet if necessary. Income generators /revenue streams include such activities as ticket sales, vendor space rentals, beverage sales, sponsorships, etc.:

Description of Expenses

Amount

Posters

appr \$100

Party Tables

appr \$450-550

Permit

\$150

Entertainment

appr \$1500-2000

Total Expenses

Description of Income Generators

Amount

Vendor Fees

*Sponsorship from
local businesses*

Total Income

Net Income (Total Income minus Total Expenses):

Have you included sponsorships as one of your income generators? If so do you have the ability to raise these sponsorships? ☒ YES ☐ NO

List of Vendors and Businesses in Attendance

NOTE: Event Organizers and Vendors must complete the applications and permits through the Union County Public Safety Division. Please contact the Environment Health Department for additional information. (704)283-3553

[illegible]



STAFF REPORT

TO: Downtown Advisory Board

DATE: February 19, 2024

FROM: Jeff Wells, Assistant City Manager

PREPARED BY: Donna O’Keefe, Downtown Manager

SUBJECT: PRONTO Incentive Grant and Blade/Suspension Sign Grant for 217 N. Hayne Street, Patty and the Dogs, owner Matthew Wilson.

SUMMARY STATEMENT

The Downtown Advisory Board is asked to consider a recommendation for two Downtown Economic Incentive Grant applications for Matthew Wilson, owner of Patty and the Dogs, 217 N. Hayne Street.

1. Blade/Suspension Sign Grant
 2. Downtown Economic Development Incentive PRONTO Grant
-

REVIEW

Matthew Wilson, owner of Patty and the Dogs has entered into a five-year lease with Mary Helen Treece, owner of The Secrest Building LLC for a restaurant space at 217 N. Hayne Street. Patty and the Dogs will be a new food service business located in the central business district of Monroe. Mr. Wilson is making a \$48,000 dollar investment in this new business. It is the recommendation of Staff that the Downtown Advisory Board recommend the Downtown Incentives as outlined with the following stipulations:

Grant funds for the PRONTO Program are based on square footage and cannot exceed \$10,000. Patty and the Dogs is a 1200 sq. ft. restaurant, and is eligible for \$5 per sq. ft. or \$6000 in rent subsidy. Rent subsidy is payable at the end of each quarter for 1 year. Proof of timely payment of the full amount of the rent is required before funds are released.

Matthew Wilson, has requested a Blade/Suspension Sign Grant for adding signage to the existing storefront at 217 N. Hayne Street. The space is approximately 1,200 square feet and is located

within Downtown District. The proposed use of the property includes retail sales on the lower level and residential on the top floors. The total project cost is \$ 832.26.

Based on the grant stipulations the Downtown Advisory Board must consider the following:

1. The grant specifically assists in funding a signage project up to \$250 of the total cost.
2. Signs must conform to the City of Monroe's Downtown Central Business District Sign Ordinance.
3. Mr. Wilson has hired Blue Roots Marketing to design, manufacture, and install the new blade sign.
4. Construction may not begin until the project is approved and a sign permit is issued.
5. This is a cost reimbursement program and grant funds are payable after the Downtown Monroe office receives copies of all paid invoices and proof of payment, and after the project has been inspected.

RECOMMENDATION

Staff requests Downtown Advisory Board recommend the approval of the PRONTO Incentive Grant to City Council with the Resolution and Budget Amendment to appropriate funds of \$6,000.00.

Staff recommends approval of the Blade/Suspension Grant up to the maximum of \$250.00. Funding is subject to compliance with the Program and subject to a general fund appropriation.

Attachments:

1. Application (2)
2. Signed Lease Agreement
3. Financial Statement
4. Business/Personal History Statement
5. Sign Rendering
6. Sign Proposal



Downtown Monroe

Downtown Pronto Grant Application



Business Name: Patty & The Dogs Deed Book: _____ Page: _____
Property Owner: Mary Helen Treva
Seacrest Building LLC
Address of Proposed Downtown Business: 217 N. Home St. Monroe, NC
Applicant's Mailing Address: 2730 Spring Branch Way
City: Monroe State: NC Zip: 28110
Applicant's Phone: 480-219-1206 Email: Patty and the Dogs@gmail.com

Select Business	Retail	Square Feet: <u>1200</u>	Amount Requested: <u>\$10000.00</u>
Approximate cost to open the business:	\$ <u>48,000</u>	Number of new Jobs: <u>4-6</u>	
Personal Investment	\$ <u>48,000</u> (Equity)	Expected daily traffic: <u>60-120 guests</u>	
Bank or other financial commitment	\$ _____	Other: _____	
Building Rehabilitation	\$ _____		

Monthly Rent/Lease \$ 1500 Additional Space provided if

Expansion 0 Sq. Ft.

Proposed Opening Date of the Business 12/11/24

Description of the Business

Restaurant serving all beef hot dogs smush burgers
and soft serve ice cream.

Please attach the following items in order for City of Monroe to make an appropriate decision on an application: Letter of intent to lease or purchase or a signed lease/purchase contract contingent on receipt of incentives, Business Plan, Financials Statement and/or pro-forma, Marketing Plan, Cost estimates for upfit/equipping the space, Business/personal history.

Signatures: Business Owner: Patty TL Date 2/3/25

Property Owner: Mary Helen Treva Date 2/5/25

GOAL

The goal of the Downtown Pronto program is to attract new investment to Downtown in the form of retail and restaurant businesses in order to build a critical mass of these uses through the occupancy of available retail/restaurant space. The incentives offered through this program will support retail and restaurant recruiting into Downtown by assisting quality businesses with up-fit, occupancy and other costs, thereby making Downtown a more attractive option for business development.

INCENTIVES

1. Rent Subsidy

Qualified retail or restaurant businesses locating in designated Downtown locations would be eligible for:

\$3.00 per square foot leased/purchased for retail use for a 12 month period; or

\$5.00 per square foot leased/purchased for restaurant use for a 12 month period

Example: Restaurant leases a 2,000 sq. ft. space: \$10,000 grant funds paid over 12 months

Payment of Rent Subsidy funds shall be made by **City of Monroe** to approved applicants at the end of each calendar quarter based on rent paid that quarter. Proof of timely payment of the full amount of rent will be required before Rent Subsidy funds are released.

2. Up-fit Assistance

Qualified retail or restaurant businesses locating in designated Downtown locations would be eligible for:

\$3.00 per square foot leased/purchased for retail use for a 12 month period; or

\$5.00 per square foot leased/purchased for restaurant use for a 12 month period

Example: Retail shop leases a 1,700 sq. ft. space: \$5,100 grant funds to be paid

Payment of Up-Fit Assistance funds (up to the approved amount) shall be made by **City of Monroe** to approved applicants in equal one-third increments annually for three years as long as the business continues to meet the qualifications for assistance. The initial payment (Payment 1) shall be made within 30 days of submittal and approval of paid invoices for up-fit expenses. Payments 2 and 3 shall be made at the anniversary date of the business opening of year 2 and 3 at the request of the grantee.

Property owners will be required to execute the Incentive Agreement along with the tenant and accept Restrictive Covenants on their properties requiring the lease rate offered to the restaurant/retail tenant and the use of the space for retail/restaurant to be maintained for three years. If the property owner wishes to change the use of the space from restaurant/retail use or to increase the lease rate within 3 years of the up-fit assistance being awarded, he/she must reimburse a pro-rata share of the up-fit grant disbursed by **City of Monroe**.

~~3. Business License Fee Economic Development Incentive~~

~~Approved retail and restaurant businesses locating in designated Downtown locations are eligible for an economic development incentive equal to the City of Monroe business license fees paid according to the following schedule:~~

~~1st year of operation: 100%~~

~~2nd year of operation: 67%~~

~~3rd year of operation: 33%~~

Business License Fees are to be paid in full and on-time to the City of Monroe. The City of Monroe will issue an Incentive payment as reimbursement for the Business License Fees paid within 30 days of a written request to receive the Business License Fee Economic Development Incentive.

GUIDELINES

1. Incentive funds are provided by the City of Monroe.
2. Incentive funds are not “as of right”, that is, they are not automatically provided to eligible retail or restaurant businesses which purchase or lease eligible properties. Applications are required and they are reviewed on a case-by-case basis by City of Monroe.
3. Incentives will be directed first to qualified applicants seeking assistance to open retail or restaurant businesses in one or more of ten (10) designated Downtown properties.
4. Applications will be received from applicants wishing to open retail or restaurant in the Downtown “core area” only (bound by Crowell St., Church St., Windsor St., Talleyrand St., Stewart St.).
5. Incentive funds are limited and the program will run as a limited time offer.
6. The timeframe to receive a decision on the awarding of incentives (from the time a complete application is received) is 30 days.
7. Grants funds will be paid to approved applicants upon submission of an invoice to the City of Monroe along with a copy of paid invoices and /or receipts. The approved applicant will pay the eligible expense first and then seek reimbursement according to these incentive guidelines from the City of Monroe. The turnaround time to submit an invoice and receive payment is 30 days.
8. In addition to the Downtown PRONTO Incentive Application, applicants must submit the following items in order for City of Monroe to make an appropriate decision on an application: Letter of intent to lease or purchase or a signed lease (min. 3 years)/purchase contract contingent on receipt of incentives, Business Plan, Financial Statements and/or pro-forma, Marketing/Advertising Plan, Cost estimates for up-fit/equipping the space, Business/personal history and experience.
9. Applicants for these incentives must be making significant new investment in Downtown either as a new eligible business or as a significant expansion of an existing eligible retail or restaurant business.
10. PRONTO maximum funding assistance is \$10,000 per property, all inclusive.

ELIGIBILITY (Final decisions on eligibility and the awarding of incentives rests with City of Monroe)

- **Retail Trade** – Generally all are eligible EXCEPT motor vehicles and parts dealers, boat dealers, recreational vehicle dealers, motorcycle dealers, tire dealers, etc., gasoline stations, manufactured/mobile home dealers, non-store retailers (mail order, vending machine, electronic auctions, etc.).
- **Consumer Goods Rental** – Products such as formal wear and video tapes/discs are eligible; EXCEPT consumer electronics and appliance rental, home health equipment rental.
- **Arts Entertainment and Recreation** – Performing arts companies, promoters of performing arts, and similar facilities.
- **Accommodations and Food Services** – Generally all are eligible EXCEPT recreational vehicle parks and campgrounds and rooming and boarding houses.
- **Dry Cleaning Services** – Generally all are eligible EXCEPT coin-operated.

City of Monroe reserves the right to waive or increase incentive program requirements and to interpret and/or adjust incentive program eligibility as it deems necessary. City of Monroe reserves the right to receive, decline, review, and approve/deny applications from uses not fitting within the above criteria on a case-by-case basis. City of Monroe will base its decisions (to receive applications and to approve or deny) based on the applicant's anticipated impact on the overall economic health of Downtown Monroe.

Submit the application form and all available documents supporting your application to **downtownmonroe@monroenc.org**.

Patty & The Dogs - B&M - Monthly Expenses

Assuming 540,000 annual Gross Year 1
 45,000 average per month gross
 10,384.62 per week
 1483.52 per day - open 7 days
 with 12.5 avg guest check - 119 guests per day

EXPENSES

Taxes	2812
Rent	1500
Utilities - Water / Electric	1500
Loan 1 (24 mo)	900
Loan 2 (24 mo)	1000
Credit Cards	1000
Equip Loan (60 mo)	3000
Salary	4000
Payroll	12000
COGs (Food / Paper Goods)	10500
Gas/Travel	200
Phone/Internet	250
POS System and Adobe and Microsoft	300
Pandora	20
Insurance	650
Uniforms/Towels	140
CPA	300
Sub Total	40072
Q Factor 5%	2003.6
Total Expected Expenses	42075.6
Monthly Revenue	45000
Percentage Profit	6.498667

Downtown Monroe Pronto Grant Application for Patty & The Dogs – 217 North Hayne St.
Monroe, NC 28112

Matthew Wilson, 980-219-1228

ABOUT THE COMPANY

Patty & The Dogs was founded in 2020 with the goal of having The Best Hot Dogs in Town. Being a Mobile Food Truck and being in different places daily meant we really had to have The Best no Matter Where We Were. We are a fun-loving company that puts Customer Service and Flavor as our Top Priorities. Patty & The Dogs was meant to be simple food done very well. No details overlooked in terms of our food and our service. We are always on top of customer trends in terms of how people order, what people order, how people interact with our food and so much more. We launched with online ordering, texting when your order is ready, mobile pays...anything we could do to make our customers experience with us more pleasant and easier. We take influence from some of the best food trucks/culinary teams in the area and know that focusing on simple items, executed at high levels produce food and memories that people will come back for over and over again.

ABOUT THE FOUNDERS

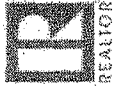
Patty & The Dogs was founded by Matthew Wilson and his family during the Pandemic of 2020. Matthew has been a food truck owner/operator since 2014. Growing up in North Carolina, early in his life, Matthew knew he wanted to own a business, and he also had a huge passion for cooking. Never professionally taught, he was self-taught and used any excuse he could to cook for others. Since 16, Matthew worked on and off in restaurants primarily focusing on Front of House, or customer facing positions. Matthew went to college at Barry University in Miami Shores, FL and graduated in 2008 with a degree in Photography. Matthew learned Operations for large mobile companies during his tenure as Director of Operations for Classic Photography, specializing in school and youth photography. In 2014, he started out with a business partner and created New Wrap Order food truck which launched in 2015. With the abrupt departure of his business partner at the end of 2018 after substantial growth, Matthew had to dissolve the company. During the time with New Wrap Order, back in 2016, Matthew met his now wife Rachel and her two children, Caelan and Corbin. With the support of his wife Rachel and their kids, Matthew went to work developing a new brand and concept using his knowledge of street food and many lessons learned. Using his passion for grilling out and tailgating, Patty & The Dogs was created.

217 NORTH HAYNE

Our location at 217 North Hayne St. is our first ever brick and mortar. We are so excited this opportunity came along and we were able to capitalize on it. We are launching with our Hot Dogs, Sausages and Hand Smashed Patty(s) and expanded side menu. Our goal is by summertime to get in a soft serve ice cream machine and have homemade soft serve ice cream and creations. That will allow us to truly be Patty & The Dogs – Grille and Creamery. We also see that as a great new item that is not currently offered in Downtown Monroe. We want to use this location to really become a part of the community and solidify ourselves here for years to come. We want to work to expand our local delivery to the historic downtown as well as have our Dog Cart at many local events to really bring an expanded presence.

THE FUTURE

Patty & The Dogs has a bright future ahead. We can expect great numbers for prime season here in Monroe (March-November) and the area is just growing so we expect good growth over the years ahead. We are launching the Dog Cart again for Private, Corporate or Large Public Events to help expand the brand name across the county and area. Our big goal for the area is to open a stand-alone Patty & The Dogs that encompasses a full Retro Arcade and Bar with indoor and outdoor seating, private rooms to rent out. We want a place that people of any age can come to have great food and great fun, building lasting memories here in Monroe. A place like the old Family Video jumps to our minds, but we see Monroe having so many options downtown that by the time we are ready, we know Monroe will still be our home.



NC REALTORS®
Commercial Forms

COMMERCIAL LEASE AGREEMENT (Single Tenant Facility)

(Note: This form is not intended to be used as a Sublease and SHOULD NOT be used in Sublease circumstances)

THIS COMMERCIAL LEASE AGREEMENT, including any and all addenda attached hereto ("Lease"), is by and between

a(n) LLC ("Landlord"),
(individual or State of formation and type of entity)
whose address is Secret Building, LLC,

PO Box 547, Monroe, NC 28111
a(n) Matthew A. Wilson, LLC ("Tenant"),
(individual or State of formation and type of entity)
whose address is 2730 Spring Breeze Way, Monroe, NC 28110

☐ If this box is checked, the obligations of Tenant under this Lease are secured by the guaranty of _____
(name(s) of guarantor(s)) attached hereto and incorporated herein by reference.

(Note: Attach Guaranty Agreement (Form 595-T) or attorney-drafted guaranty).

For and in consideration of the mutual promises set forth herein and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties hereto agree as follows:

PREMISES

1. Landlord leases unto Tenant, and Tenant hereby leases and takes upon the terms and conditions which hereinafter appear, the following described property, including any improvements located thereon (herein after called the "Premises"), to wit:

(Address): 217 N Hayne St, Monroe, NC 28112

☐ All ☐ A portion of the property in Deed Reference: Book _____, Page No. _____,
County; consisting of approximately _____ acres.

Plat Reference: Lot(s) _____, Block or Section _____, as shown on Plat Book or Slide
at Page(s) _____, County, consisting of _____ acres.

☐ If this box is checked, Premises shall mean that property described on **Exhibit A** attached hereto and incorporated herewith by reference.

(For information purposes only, the tax parcel number of the Premises is: _____)

☐ **Occupancy Limitation:** If this box is checked, notwithstanding any greater occupancy of the Premises which may be permitted by any law, statute, ordinance, regulation, rule (including rules enacted pursuant to any private use restrictions), as the same may be amended from time to time, Tenant shall not allow occupancy of the Premises to exceed _____ persons per _____ square feet in the Premises at any one time.

TERM

2. The term of this Lease shall commence on November 1, 2024 ("Lease Commencement Date"), and shall end at 11:59 p.m. (based upon the time at the locale of the Premises) on November 1, 2029, unless sooner terminated as herein provided. The first Lease Year Anniversary shall be the date twelve (12) calendar months after the first day of the first full month immediately following the Lease Commencement Date and successive Lease Year Anniversaries shall be the date twelve (12) calendar months from the previous Lease Year Anniversary.

☒ If this box is checked, Tenant shall have the option of renewing this Lease, upon written notice given to Landlord at least 60 days prior to the end of the then expiring term of this Lease, for 1 additional term(s) of 5 years each.



North Carolina Association of REALTORS®, Inc.

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Tenant Initials MW Landlord Initials MJF
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Elite Associates, Inc., 219 N. Hayne St. Monroe NC 28112
Mary Helen Treese

Phone: (704)607-0598

Fax: _____
www.ltwall.com

Patty & The Dogs,

☐ If this box is checked, Tenant shall have the option of renewing this Lease, upon written notice given to Landlord at least _____ days prior to the end of the then expiring term of this Lease, for additional term(s) as specified on **Exhibit B**.

☐ **Option to Lease-** If this box is checked, Tenant, upon the payment of the sum of \$ _____ (which sum is not rental or security deposit hereunder, but is consideration for this Option to Lease and is non-refundable under any circumstances) shall have a period of _____ days prior to the Lease Commencement Date ("Option Period") in which to inspect the Premises and make inquiry regarding such sign regulations, zoning regulations, utility availability, private restrictions or permits or other regulatory requirements as Tenant may deem appropriate to satisfy itself as to the use of the Premises for Tenant's intended purposes. Tenant shall conduct all such on-site inspections, examinations, inquiries and other review of the Premises in a good and workmanlike manner, shall repair any damage to the Premises caused by Tenant's entry and on-site inspections and shall conduct same in a manner that does not unreasonably interfere with Landlord's or any tenant's use and enjoyment of the Premises. In that respect, Tenant shall make reasonable efforts to undertake on-site inspections outside of the hours any tenant's business is open to the public and shall give prior notice to the tenant at the Premises of any entry onto the Premises for the purpose of conducting inspections. Upon Landlord's request, Tenant shall provide to Landlord evidence of general liability insurance. Tenant shall also have a right to review and inspect all contracts or other agreements affecting or related directly to the Premises and shall be entitled to review such books and records of Landlord that relate directly to the operation and maintenance of the Premises, provided, however, that Tenant shall not disclose any information regarding the Premises (or any tenant therein) unless required by law and the same shall be regarded as confidential, to any person, except to its attorneys, accountants, lenders and other professional advisors, in which case Tenant shall obtain their agreement to maintain such confidentiality. Tenant assumes all responsibility for the acts of itself, its agents or representatives in exercising its rights under this Option to Lease and agrees to indemnify and hold Seller harmless from any damages resulting therefrom. This indemnification obligation of Tenant shall survive the termination of this Option to Lease or this Lease. Tenant shall, at Tenant's expense, promptly repair any damage to the Premises caused by Tenant's entry and on-site inspections. **IF TENANT CHOOSES NOT TO LEASE THE PREMISES, FOR ANY REASON OR NO REASON, AND PROVIDES WRITTEN NOTICE TO LANDLORD THEREOF PRIOR TO THE EXPIRATION OF THE OPTION PERIOD, THEN THIS LEASE SHALL TERMINATE AND NEITHER PARTY SHALL HAVE ANY FURTHER OBLIGATIONS HEREUNDER AND LANDLORD SHALL RETURN TO TENANT ANY RENTAL OR SECURITY DEPOSIT PAID TO LANDLORD HEREUNDER.** Tenant shall be deemed to have exercised its Option to Lease and to be bound under the terms of this Lease if (i) Tenant shall occupy the Premises prior to the expiration of the Option Period, whereupon the date of occupancy shall be deemed the Lease Commencement Date, or (ii) Tenant shall not provide written notice to Landlord of its termination of this Lease prior to the expiration of the Option Period.

RENTAL

3. (a) **Rent.** Beginning on November 1, 2024 ("Rent Commencement Date"), Tenant agrees to pay Landlord (or its Agent as directed by Landlord), without notice, demand, deduction or set off, an annual rental of \$ 18,000.00, payable in equal monthly installments of \$ 1,500.00, in advance on the first day of each calendar month during the term hereof. Upon execution of this Lease, Tenant shall pay to Landlord the first monthly installment of rent due hereunder. Rental for any period during the term hereof which is less than one month shall be the pro-rated portion of the monthly installment of rental due, based upon a 30-day month.

(b) **Rent Adjustment.** The annual rental payable hereunder (and accordingly the monthly installments) shall be adjusted every Lease Year Anniversary, including any Lease Year Anniversaries resulting from a renewal exercised by Tenant in Section 2 herein, by (check only one):

☐ _____ % **OR** \$ _____ over the amount then payable hereunder.

☐ The greater of: (i) _____ % over the amount then payable hereunder, or, (ii) the percentage increase (but not any decrease) in the numerical index of the "Consumer Price Index for All Urban Consumers" (1982-84 = 100) published by the Bureau of Labor Statistics of the United States Department of Labor ("CPI") for the immediately preceding twelve (12) month period over the amount then payable hereunder.

☒ **B.** The annual rental payable hereunder (and accordingly the monthly installments) shall be adjusted as provided on **Exhibit**

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Patty & The Dogs,

Tenant shall pay all rental to Landlord's Agent at the following address:

Secrest Building, LLC, PO Box 547, Monroe, NC 28111. Venmo: @MH Trece. Rent shall increase every year on November 1st, by \$100 per month.

LATE CHARGES

4. If Landlord fails to receive full rental payment within 5 days after it becomes due, Tenant shall pay Landlord, as additional rental, a late charge equal to **Five Point Zero** percent **5,000** (%) of the overdue amount or \$ _____ whichever is greater, plus any actual bank fees incurred for dishonored payments. The parties agree that such a late charge represents a fair and reasonable estimate of the cost Landlord will incur by reason of such late payment.

SECURITY DEPOSIT

5. Upon the execution of this Lease, Tenant shall deposit with Landlord the sum of \$ **1,500.00** as a security deposit which shall be held by Landlord as security for the full and faithful performance by Tenant of each and every term, covenant and condition of this Lease. The security deposit does not represent payment of and Tenant shall not presume application of same as payment of the last monthly installment of rental due under this Lease. Landlord shall have no obligation to segregate or otherwise account for the security deposit except as provided in this Section 5. If any of the rental or other charges or sums payable by Tenant shall be over-due and unpaid or should payments be made by Landlord on behalf of Tenant, or should Tenant fail to perform any of the terms of this Lease, then Landlord may, at its option, appropriate and apply the security deposit, or so much thereof as may be necessary, to compensate toward the payment of the rents, charges or other sums due from Tenant, or towards any loss, damage or expense sustained by Landlord resulting from such default on the part of the Tenant; and in such event Tenant upon demand shall restore the security deposit to the amount set forth above in this Section 5. In the event Tenant furnishes Landlord with proof that all utility bills and other bills of Tenant related to the Premises have been paid through the date of Lease termination, and performs all of Tenant's other obligations under this Lease, the security deposit shall be returned to Tenant within sixty (60) days after the date of the expiration or sooner termination of the term of this Lease and the surrender of the Premises by Tenant in compliance with the provisions of this Lease.

☐ If this box is checked, Agent shall hold the security deposit in trust and shall be entitled to the interest, if any, thereon.

UTILITY BILLS/SERVICE CONTRACTS

6. In addition to Tenant's obligation to pay for repairs in Section 12 herein, Landlord and Tenant agree that utility bills and service contracts ("Service Obligations") for the Premises shall be paid by the party indicated below as to each Service Obligation. In each instance, the party undertaking responsibility for payment of a Service Obligation covenants that they will pay the applicable bills prior to delinquency. The responsibility to pay for a Service Obligation shall include all metering, hook-up fees or other miscellaneous charges associated with establishing, installing and maintaining such utility or contract in said party's name. Within thirty (30) days of the Lease Commencement Date, Tenant shall provide Landlord with a copy of any requested Tenant Service Obligation information.

Service Obligation	Landlord	Tenant	Not Applicable
Sewer/Septic		X	
Water		X	
Electric		X	
Gas			X
Telephone		X	
HVAC (maintenance/service contract)		X	
Elevator (including phone line)			X
Security System		X	
Fiber Optic		X	
Janitor/Cleaning		X	
Trash/Dumpster	X		
Landscaping/Maintenance			X
Sprinkler System (including phone line)	X		
Pest Control		X	
Snow/Ice Removal			X

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Tenant Initials MW

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Patty & The Dogs,

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Landlord shall not be liable for injury to Tenant's business or loss of income therefrom or for damage that may be sustained by the person, merchandise or personal property of Tenant, its employees, agents, invitees or contractors or any other person in or about the Premises, caused by or resulting from fire, steam, electricity, gas, water or rain, which may leak or flow from or into any part of the Premises, or from the leakage, leakage, obstruction or other defects of any utility installations, air conditioning system or other components of the Premises, except to the extent that such damage or loss is caused by Landlord's gross negligence or willful misconduct. Landlord represents and warrants that the heating, ventilation and air conditioning system(s) and utility installations existing as of the Lease Commencement Date shall be in good order and repair. Subject to the provisions of this Section 6, Landlord shall not be liable in damages or otherwise for any discontinuance, failure or interruption of service to the Premises of utilities or the heating, ventilation and air conditioning system(s) and Tenant shall have no right to terminate this Lease or withhold rental because of the same.

RULES AND REGULATIONS

7. ☐ If this box is checked, the rules and regulations attached hereto ("Rules and Regulations") are made a part of this Lease. Tenant agrees to comply with all Rules and Regulations of Landlord in connection with the Premises which are in effect at the time of the execution of the Lease or which may be from time to time promulgated by Landlord in its reasonable discretion, provided notice of such new Rules and Regulations is given to Tenant in writing and the same are not in conflict with the terms and conditions of this Lease.

PERMITTED USES

8. The permitted use of the Premises shall be: **Takeout Restaurant**
("Permitted Use"). The Premises shall be used and wholly occupied by Tenant solely for the purposes of conducting the Permitted Use, and the Premises shall not be used for any other purposes unless Tenant obtains Landlord's prior written approval of any change in use.

Landlord makes no representation or warranty regarding the suitability of the Premises for or the legality (under zoning or other applicable ordinances) of the Permitted Use for the Premises, provided however, that Landlord does represent that it has no contractual obligations with other parties which will materially interfere with or prohibit the Permitted Use of Tenant at the Premises. At Tenant's sole expense, Tenant shall procure, maintain and make available for Landlord's inspection from time to time any governmental license(s) or permit(s) required for the proper and lawful conduct of Tenant's business in the Premises.

Tenant shall not cause or permit any waste to occur in the Premises and shall not overload the floor, or any mechanical, electrical, plumbing or utility systems serving the Premises. Tenant shall keep the Premises, and every part thereof, in a clean and wholesome condition, free from any objectionable noises, loud music, objectionable odors or nuisances.

TAXES AND INSURANCE

(Note: The following box should only be checked if there are no boxes checked below in Section 9.)

☒ If this box is checked, Tenant shall have no responsibility to reimburse Landlord for taxes or insurance.

9. Landlord shall pay all taxes (including but not limited to, ad valorem taxes, special assessments and any other governmental charges) on the Premises and shall procure and pay for such commercial general liability, broad form fire and extended and special perils insurance with respect to the Premises as Landlord in its reasonable discretion may deem appropriate. Tenant shall reimburse Landlord for all taxes and insurance as provided herein within fifteen (15) days after receipt of notice from Landlord as to the amount due. Tenant shall be solely responsible for insuring Tenant's personal and business property and for paying any taxes or governmental assessments levied thereon. Tenant shall reimburse Landlord for taxes and insurance during the term of this Lease, and any extension or renewal thereof. **If boxes are checked below, the manner of reimbursement shall be as indicated:**

Taxes

☐ The amount by which all taxes (including but not limited to, ad valorem taxes, special assessments and any other governmental charges) on the Premises for each tax year exceed all taxes on the Premises for the tax year _____; or

☐ All taxes (including but not limited to, ad valorem taxes, special assessments and any other governmental charges) on the Premises for each tax year.

If one of the two boxes above is checked, then if the final Lease Year of the term fails to coincide with the tax year, any excess for the tax year during which the term ends shall be reduced by the pro rata part of such tax year beyond the Lease term. If such taxes for the year in which the Lease terminates are not ascertainable before payment of the last month's rental, then the amount of such taxes assessed against the Property for the previous tax year shall be used as a basis for determining the pro rata share, if any, to be paid by Tenant for that portion of the last Lease Year.

If one of the two boxes above is checked, Tenant shall reimburse Landlord for taxes by paying to Landlord, beginning on the Rent Commencement Date and on the first day of each calendar month during the term hereof, an amount equal to one-twelfth (1/12) of the then current tax payments for the Premises. Upon receipt of bills, statements or other evidence of taxes due, Landlord shall pay or cause to be paid the taxes. If at any time the reimbursement payments by Tenant hereunder do not equal the amount of taxes paid by Landlord, Tenant shall upon demand pay to Landlord an amount equal to the deficiency or Landlord shall refund to Tenant any overpayment (as applicable) as documented by Landlord. Landlord shall have no obligation to segregate or otherwise account for the tax reimbursements paid hereunder except as provided in this Section 9.

Insurance

- ☐ the excess cost of commercial general liability, broad form fire and extended and special perils insurance with respect to the Premises over the cost of the first year of the Lease term for each subsequent year during the term of this Lease; or
- ☐ the cost of all commercial general liability, broad form fire and extended and special perils insurance with respect to the Premises.

If one of the two boxes above is checked, Tenant shall reimburse Landlord for insurance by paying to Landlord, beginning on the Rent Commencement Date and on the first day of each calendar month during the term hereof, an amount equal to one-twelfth (1/12) of the then current insurance premiums for the Premises. Upon receipt of bills, statements or other evidence of insurance premiums due, Landlord shall pay or cause to be paid the insurance premiums. If at any time the reimbursement payments by Tenant hereunder do not equal the amount of insurance premiums paid by Landlord, Tenant shall upon demand pay to Landlord an amount equal to the deficiency or Landlord shall refund to Tenant any overpayment (as applicable) as documented by Landlord. Landlord shall have no obligation to segregate or otherwise account for the insurance premium reimbursements paid hereunder except as provided in this Section 9.

Provided however, notwithstanding any provision of the foregoing, that in the event Tenant's use of the Premises results in an increase in the rate of insurance on the Property, Tenant shall pay to Landlord, upon demand and as additional rental, the amount of any such increase.

INSURANCE; WAIVER; INDEMNITY

10. (a) During the term of this Lease, Tenant shall maintain commercial general liability insurance coverage (occurrence coverage) with broad form contractual liability coverage and with coverage limits of not less than \$2 million combined single limit, per occurrence, specifically including liquor liability insurance covering consumption of alcoholic beverages by customers of Tenant should Tenant choose to sell alcoholic beverages. Such policy shall insure Tenant's performance of the indemnity provisions of this Lease, but the amount of such insurance shall not limit Tenant's liability nor relieve Tenant of any obligation hereunder. All policies of insurance provided for herein shall name as "additional insureds" Landlord, Landlord's Agent, all mortgagees of Landlord and such other individuals or entities as Landlord may from time to time designate upon written notice to Tenant. Tenant shall provide to Landlord, at least thirty (30) days prior to expiration, certificates of insurance to evidence any renewal or additional insurance procured by Tenant. Tenant shall provide evidence of all insurance required under this Lease to Landlord prior to the Lease Commencement Date.

(b) Landlord (for itself and its insurer) waives any rights, including rights of subrogation, and Tenant (for itself and its insurer) waives any rights, including rights of subrogation, each may have against the other for compensation of any loss or damage occasioned to Landlord or Tenant arising from any risk generally covered by the "all risks" insurance required to be carried by Landlord and Tenant. The foregoing waivers of subrogation shall be operative only so long as available in the State of North Carolina. The foregoing waivers shall be effective whether or not the parties maintain the insurance required to be carried pursuant to this Lease.

(c) Except as otherwise provided in Section 10(b), Tenant indemnifies Landlord for damages proximately caused by the negligence or wrongful conduct of Tenant and Tenant's employees, agents, invitees or contractors. Except as otherwise provided in Section 10(b), Landlord indemnifies Tenant for damages proximately caused by the negligence or wrongful conduct of Landlord and Landlord's employees, agents, invitees or contractors. The indemnity provisions in this Section 10 cover personal injury and property damage and shall bind the employees, agents, invitees or contractors of Landlord and Tenant (as the case may be). The indemnity obligations in this Section 10 shall survive the expiration or earlier termination of this Lease.

REPAIRS BY LANDLORD

11. Landlord agrees to keep in good repair the roof, foundation, structural supports and exterior walls of the buildings located on the Premises (exclusive of all glass and exclusive of all exterior doors) and, except as may be specifically allocated to Tenant in Section

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Tenant Initials MLW Landlord Initials MLW

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12 herein, Landlord agrees to be responsible for capital replacements on the Premises; provided that Landlord shall not be responsible for repairs or capital replacements rendered necessary by the negligence or intentional wrongful acts of Tenant, its employees, agents, invitees or contractors. Tenant shall promptly report in writing to Landlord any defective condition known to it which Landlord is required to repair or replace and failure to report such conditions shall make Tenant responsible to Landlord for any liability incurred by Landlord by reason of such conditions.

(Note: Should Landlord and Tenant need to further detail the allocation of responsibility hereunder, the Special Stipulations box at the end of the Lease should be checked and such allocation should be specified on an Exhibit B.)

REPAIRS BY TENANT

12. (a) Tenant accepts the Premises in their present condition and as suited for the Permitted Use and Tenant's intended purposes. Tenant, throughout the initial term of this Lease, and any extension or renewal thereof, at its expense, shall maintain in good order and repair the Premises, (except those repairs expressly required to be made by Landlord hereunder), specifically including but not limited to any building and other improvements located thereon, all light bulb and ballast replacements, plumbing fixtures and systems repairs within the Premises and water heater repairs. Tenant further agrees to care for the grounds around the building, including the mowing of grass, care of shrubs and general landscaping. Tenant shall use only licensed contractors for repairs where such license is required. Landlord shall have the right to approve the contractor as to any repairs in excess of \$ 200.00

☒ **Tenant HVAC Repair.** If this box is checked, Tenant, at its expense, shall maintain the heating, ventilation and air conditioning system(s) ("HVAC Systems") in good order and repair, including but not limited to replacement of parts, compressors, air handling units and heating units. Tenant shall be required to maintain a preventive maintenance contract for the HVAC Systems on terms and with a provider reasonably acceptable to Landlord, which contract shall call for at least semi-annual maintenance, inspection and repair of such HVAC Systems ("HVAC Contract"). Tenant shall provide a copy of the HVAC Contract to Landlord annually. Provided that: (i) Tenant has kept the HVAC Contract in force, and, (ii) Tenant shall have obtained Landlord's prior written approval of the contractor and the repair or replacement expenses for the HVAC Systems, then, for any calendar year, Tenant shall be responsible for the cost of repairing or replacing the HVAC Systems (or any major component thereof) up to \$ _____ per HVAC System with a maximum repair or replacement cost of \$ _____ for all HVAC Systems ("HVAC Cap") in such year. Tenant shall provide Landlord copies of all records related to the servicing, maintenance, repair, and replacement of the HVAC Systems upon the occurrence of any service, maintenance, repair, or replacement of the HVAC Systems. Landlord shall be responsible for paying the repair cost or replacement cost of such HVAC System in excess of the HVAC Cap.

☐ **Landlord HVAC Repair.** If this box is checked, Landlord, at its expense, shall maintain the heating, ventilation and air conditioning system(s) ("HVAC Systems") in good order and repair, including but not limited to replacement of parts, compressors, air handling units and heating units. Provided that, Tenant shall reimburse Landlord for the cost of repairing or replacing the HVAC Systems (or any major component thereof) an amount up to \$ _____ per HVAC System with a maximum replacement cost of \$ _____ for all HVAC Systems ("HVAC Cap") in such year. Landlord shall be responsible for paying the repair cost or replacement cost of such HVAC System in excess of the HVAC Cap. Tenant shall reimburse Landlord for the amount of the HVAC Cap payable hereunder upon the written request of Landlord.

(b) Tenant, Tenant's employees, agents, invitees or contractors shall take no action which may void any manufacturers or installers warranty with relation to the Premises. Tenant shall indemnify and hold Landlord harmless from any liability, claim, demand or cause of action arising on account of Tenant's breach of the provisions of this Section 12.

ALTERATIONS

13. Tenant shall not make any alterations, additions, or improvements to the Premises without Landlord's prior written consent, which consent shall not be unreasonably withheld, conditioned or delayed. Landlord, in connection with Landlord's consent to same, may designate any such alterations, additions, or improvements to the Premises as subject to removal upon the expiration or earlier termination of this Lease, in which case, upon Landlord's written notice to Tenant to remove same at the expiration or earlier termination of this Lease, Tenant shall do so and restore the Premises to the condition that existed prior to such alterations, additions, or improvements being made. Tenant shall promptly remove any alterations, additions, or improvements constructed in violation of this Section 13 upon Landlord's written request. All approved alterations, additions, and improvements will be accomplished in a good and workmanlike manner, in conformity with all applicable laws and regulations, and by a contractor approved by Landlord, free of any liens or encumbrances. Tenant has no authority to allow, will not permit, and will indemnify Landlord and hold it harmless from, any contractors', laborers', mechanics', or materialmen's liens, or any other similar liens filed against the Premises in connection with any alterations, additions, or improvements to the Premises.

SURRENDERING THE PREMISES

14. Tenant shall schedule its move date with Landlord, in writing, in advance of the expiration or earlier termination of this Lease. Tenant agrees to return the Premises to Landlord at the expiration or earlier termination of this Lease, broom clean and in as good condition and repair as on the Lease Commencement Date, natural wear and tear, damage by storm, fire, lightning, earthquake or other casualty alone excepted. By written notice to Tenant, Landlord may require Tenant to remove any alterations, additions or improvements at the expiration or earlier termination of this Lease (whether or not made with Landlord's consent and whether or not

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Tenant Initials WJ

Landlord Initials WJ

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designated via Section 13 as subject to removal) and to restore the Premises to its prior condition as of the Lease Commencement Date, all at Tenant's expense. All alterations, additions and improvements which Landlord has not required Tenant to remove shall become Landlord's property and shall be surrendered to Landlord upon the termination of this Lease, except that Tenant may remove any of Tenant's personal property or trade fixtures which can be removed without material damage to the Premises. Tenant shall repair, at Tenant's expense, any damage to the Premises caused by the removal of any such personal property or trade fixtures.

(Note: Should Landlord and Tenant need to further enumerate their intent/understanding as to the status of items or property as fixtures, trade fixtures, or personal property hereunder, the Special Stipulations box at the end of the Lease should be checked and such enumeration should be specified by listing same by category on an Exhibit B.)

DESTRUCTION OF OR DAMAGE TO PREMISES

15. (a) If the Premises are totally destroyed by storm, fire, lightning, earthquake or other casualty, Landlord shall have the right to terminate this Lease on written notice to Tenant within thirty (30) days after such destruction and this Lease shall terminate as of the date of such destruction and rental shall be accounted for as between Landlord and Tenant as of that date.

(b) If the Premises are damaged but not wholly destroyed by any such casualties or if the Landlord does not elect to terminate the Lease under Section 15(a) above, Landlord shall commence (or shall cause to be commenced) reconstruction of the Premises within one hundred twenty (120) days after such occurrence and prosecute the same diligently to completion, not to exceed two hundred seventy (270) days from the date upon which Landlord receives applicable permits and insurance proceeds. In the event Landlord shall fail to substantially complete reconstruction of the Premises within said two hundred seventy (270) day period, Tenant's sole remedy shall be to terminate this Lease.

(c) In the event of any casualty at the Premises during the last one (1) year of the Lease Term, Landlord and Tenant each shall have the option to terminate this Lease on written notice to the other of exercise thereof within sixty (60) days after such occurrence.

(d) In the event of reconstruction of the Premises, Tenant shall continue the operation of its business in the Premises during any such period to the extent reasonably practicable from the standpoint of prudent business management, and the obligation of Tenant to pay annual rental and any other sums due under this Lease shall remain in full force and effect during the period of reconstruction. The annual rental and other sums due under this Lease shall be abated proportionately with the degree to which Tenant's use of the Premises is impaired, commencing from the date of destruction and continuing during the period of such reconstruction. Tenant shall not be entitled to any compensation or damages from Landlord for loss of use of the whole or any part of the Premises, Tenant's personal property, or any inconvenience or annoyance occasioned by such damage, reconstruction or replacement.

(e) In the event of the termination of this Lease under any of the provisions of this Section 15, both Landlord and Tenant shall be released from any liability or obligation under this Lease arising after the date of termination, except as otherwise provided for in this Lease.

GOVERNMENTAL ORDERS

16. Tenant, at its own expense, agrees to comply with: (a) any law, statute, ordinance, regulation, rule, requirement, order, court decision or procedural requirement of any governmental or quasi-governmental authority having jurisdiction over the Premises, (b) the rules and regulations of any applicable governmental insurance authority or any similar body, relative to the Premises and Tenant's activities therein; (c) provisions of or rules enacted pursuant to any private use restrictions, as the same may be amended from time to time and (d) the Americans with Disabilities Act (42 U.S.C.S. §12101, et seq.) and the regulations and accessibility guidelines enacted pursuant thereto, as the same may be amended from time to time. Landlord and Tenant agree, however, that if in order to comply with such requirements the cost to Tenant shall exceed a sum equal to one (1) year's rent, then Tenant may terminate this Lease by giving written notice of termination to Landlord in accordance with the terms of this Lease, which termination shall become effective sixty (60) days after receipt of such notice and which notice shall eliminate the necessity of compliance with such requirements, unless, within thirty (30) days of receiving such notice, Landlord agrees in writing to be responsible for such compliance, at its own expense, and commences compliance activity, in which case Tenant's notice given hereunder shall not terminate this Lease.

CONDEMNATION

17. (a) If the entire Premises shall be appropriated or taken under the power of eminent domain by any governmental or quasi-governmental authority or under threat of and in lieu of condemnation (hereinafter, "taken" or "taking"), this Lease shall terminate as of the date of such taking, and Landlord and Tenant shall have no further liability or obligation arising under this Lease after such date, except as otherwise provided for in this Lease.

(b) If more than twenty-five percent (25%) of the floor area of any building of the Premises is taken, or if by reason of any taking, regardless of the amount so taken, the remainder of the Premises is not one undivided space or is rendered unusable for the Permitted Use, either Landlord or Tenant shall have the right to terminate this Lease as of the date Tenant is required to vacate the

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Tenant Initials MLW

Landlord Initials MLW

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portion of the Premises taken, upon giving notice of such election within thirty (30) days after receipt by Tenant from Landlord of written notice that said Premises have been or will be so taken. In the event of such termination, both Landlord and Tenant shall be released from any liability or obligation under this Lease arising after the date of termination, except as otherwise provided for in this Lease.

(c) Landlord and Tenant, immediately after learning of any taking, shall give notice thereof to each other.

(d) If this Lease is not terminated on account of a taking as provided herein above, then Tenant shall continue to occupy that portion of the Premises not taken and the parties shall proceed as follows: (i) at Landlord's cost and expense and as soon as reasonably possible, Landlord shall restore (or shall cause to be restored) the Premises remaining to a complete unit of like quality and character as existed prior to such appropriation or taking, and (ii) the annual rent provided for in Section 3 and other sums due under the Lease shall be reduced on an equitable basis, taking into account the relative values of the portion taken as compared to the portion remaining. Tenant waives any statutory rights of termination that may arise because of any partial taking of the Premises.

(e) Landlord shall be entitled to the entire condemnation award for any taking of the Premises or any part thereof. Tenant's right to receive any amounts separately awarded to Tenant directly from the condemning authority for the taking of its merchandise, personal property, relocation expenses and/or interests in other than the real property taken shall not be affected in any manner by the provisions of this Section 17, provided Tenant's award does not reduce or affect Landlord's award and provided further, Tenant shall have no claim for the loss of its leasehold estate.

ASSIGNMENT AND SUBLETTING

18. Tenant shall not assign this Lease or any interest hereunder or sublet the Premises or any part thereof, or permit the use of the Premises by any party other than the Tenant, without Landlord's prior written consent, which consent shall not be unreasonably withheld, conditioned or delayed. Tenant shall pay to Landlord, concurrently with any request for consent to assignment or sublet, a non-refundable fee of \$ _____ as payment to Landlord for its review and processing of the request. In addition, Tenant shall pay to Landlord any legal fees and expenses incurred by Landlord in connection with the proposed assignment or sublet, to the extent such amounts exceed \$ _____. Consent to any assignment or sublease shall not impair this provision and all later assignments or subleases shall be made likewise only on the prior written consent of Landlord. No sublease or assignment by Tenant shall relieve Tenant of any liability hereunder.

EVENTS OF DEFAULT

19. The happening of any one or more of the following events (hereinafter any one of which may be referred to as an "Event of Default") during the term of this Lease, or any renewal or extension thereof, shall constitute a breach of this Lease on the part of the Tenant: (a) Tenant fails to pay when due the rental or any other monetary obligation as provided for herein; (b) Tenant abandons or vacates the Premises; (c) Tenant fails to comply with or abide by and perform any non-monetary obligation imposed upon Tenant under this Lease within thirty (30) days after written notice of such breach; (d) Tenant is adjudicated bankrupt; (e) A permanent receiver is appointed for Tenant's property and such receiver is not removed within sixty (60) days after written notice from Landlord to Tenant to obtain such removal; (f) Tenant, either voluntarily or involuntarily, takes advantage of any debt or relief proceedings under any present or future law, whereby the rent or any part thereof is, or is proposed to be, reduced or payment thereof deferred and such proceeding is not dismissed within sixty (60) days of the filing thereof; (g) Tenant makes an assignment for benefit of creditors; or (h) Tenant's effects are levied upon or attached under process against Tenant, which is not satisfied or dissolved within thirty (30) days after written notice from Landlord to Tenant to obtain satisfaction thereof.

REMEDIES UPON DEFAULT

20. Upon the occurrence of Event of Default, Landlord may pursue any one or more of the following remedies separately or concurrently, without prejudice to any other remedy herein provided or provided by law: (a) Landlord may terminate this Lease by giving written notice to Tenant and upon such termination shall be entitled to recover from Tenant damages as may be permitted under applicable law; or (b) Landlord may terminate this Lease by giving written notice to Tenant and, upon such termination, shall be entitled to recover from the Tenant damages in an amount equal to all rental which is due and all rental which would otherwise have become due throughout the remaining term of this Lease, or any renewal or extension thereof (as if this Lease had not been terminated); or (c) Landlord, as Tenant's agent, without terminating this Lease, may enter upon and rent the Premises, in whole or in part, at the best price obtainable by reasonable effort, without advertisement and by private negotiations and for any term Landlord deems proper, with Tenant being liable to Landlord for the deficiency, if any, between Tenant's rent hereunder and the price obtained by Landlord on reletting, provided however, that Landlord shall not be considered to be under any duty by reason of this provision to take any action to mitigate damages by reason of Tenant's default and expressly shall have no duty to mitigate Tenant's damages. No termination of this Lease prior to the normal ending thereof, by lapse of time or otherwise, shall affect Landlord's right to collect rent for the period prior to termination thereof. Tenant acknowledges and understands that Landlord's acceptance of partial rental will not waive Tenant's breach of this Lease or limit Landlord's rights against Tenant hereunder or Landlord's right to evict Tenant through a summary ejectment proceeding, whether filed before or after Landlord's acceptance of any such partial rental.

EXTERIOR SIGNS

21. Tenant shall place no signs upon the outside walls, doors or roof of the Premises, except with the express written consent of the Landlord in Landlord's sole discretion. Any consent given by Landlord shall expressly not be a representation of or warranty of any legal entitlement to signage at the Premises. Any and all signs placed on the Premises by Tenant shall be maintained in compliance with governmental rules and regulations governing such signs and Tenant shall be responsible to Landlord for any damage caused by installation, use or maintenance of said signs, and all damage incident to removal thereof.

LANDLORD'S ENTRY OF PREMISES

22. Landlord may advertise the Premises "For Rent" 60 days before the termination of this Lease. Landlord may enter the Premises upon prior notice at reasonable hours to exhibit same to prospective purchasers or tenants, to make repairs required of Landlord under the terms hereof, for reasonable business purposes and otherwise as may be agreed by Landlord and Tenant. Landlord may enter the Premises at any time without prior notice, in the event of an emergency or to make emergency repairs to the Premises. Upon request of Landlord, Tenant shall provide Landlord with a functioning key to the Premises and shall replace such key if the locks to the Premises are changed.

QUIET ENJOYMENT

23. So long as Tenant observes and performs the covenants and agreements contained herein, it shall at all times during the Lease term peacefully and quietly have and enjoy possession of the Premises, subject to the terms hereof.

HOLDING OVER

24. If Tenant remains in possession of the Premises after expiration of the term hereof, Tenant shall be a tenant at sufferance and there shall be no renewal of this Lease by operation of law. In such event, commencing on the date following the date of expiration of the term, the monthly rental payable under Section 3 above shall for each month, or fraction thereof during which Tenant so remains in possession of the Premises, be double the monthly rental otherwise payable under Section 3 above.

ENVIRONMENTAL LAWS

25. (a) Tenant covenants that with respect to any Hazardous Materials (as defined below) it will comply with any and all federal, state or local laws, ordinances, rules, decrees, orders, regulations or court decisions relating to hazardous substances, hazardous materials, hazardous waste, toxic substances, environmental conditions on, under or about the Premises or soil and ground water conditions, including, but not limited to, the Comprehensive Environmental Response, Compensation and Liability Act of 1980, the Resource Conservation and Recovery Act, the Hazardous Materials Transportation Act, any other legal requirement concerning hazardous or toxic substances, and any amendments to the foregoing (collectively, all such matters being "Hazardous Materials Requirements"). Tenant shall remove from the Premises, all Hazardous Materials that were placed on the Premises by Tenant or Tenant's employees, agents, invitees or contractors, either after their use by Tenant or upon the expiration or earlier termination of this Lease, in compliance with all Hazardous Materials Requirements.

(b) Tenant shall be responsible for obtaining all necessary permits in connection with its use, storage and disposal of Hazardous Materials, and shall develop and maintain, and where necessary file with the appropriate authorities, all reports, receipts, manifest, filings, lists and invoices covering those Hazardous Materials and Tenant shall provide Landlord with copies of all such items upon request. Tenant shall provide within five (5) days after receipt thereof, copies of all notices, orders, claims or other correspondence from any federal, state or local government or agency alleging any violation of any Hazardous Materials Requirements by Tenant, or related in any manner to Hazardous Materials. In addition, Tenant shall provide Landlord with copies of all responses to such correspondence at the time of the response.

(c) Tenant hereby indemnifies and holds harmless Landlord, its successors and assigns from and against any and all losses, liabilities, damages, injuries, penalties, fines, costs, expenses and claims of any and every kind whatsoever (including attorney's fees and costs) paid, incurred or suffered by, or asserted against Landlord as a result of any claim, demand or judicial or administrative action by any person or entity (including governmental or private entities) for, with respect to, or as a direct or indirect result of, the presence on or under or the escape, seepage, leakage, spillage, discharge, emission or release from the Premises of any Hazardous Materials caused by Tenant or Tenant's employees, agents, invitees or contractors. This indemnity shall also apply to any release of Hazardous Materials caused by a fire or other casualty to the Premises if such Hazardous Materials were stored on the Premises by Tenant, its agents, employees, invitees or successors in interest.

(d) For purposes of this Lease, "Hazardous Materials" means any chemical, compound, material, substance or other matter that: (i) is defined as a hazardous substance, hazardous material or waste, or toxic substance pursuant to any Hazardous Materials Requirements, (ii) is regulated, controlled or governed by any Hazardous Materials Requirements, (iii) is petroleum or a petroleum product, or (iv) is asbestos, formaldehyde, a radioactive material, drug, bacteria, virus, or other injurious or potentially injurious material (by itself or in combination with other materials).

(e) The warranties and indemnities contained in this Section 25 shall survive the termination of this Lease.

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Tenant Initials ML Landlord Initials MH

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SUBORDINATION; ATTORNNMENT; ESTOPPEL

26. (a) This Lease and all of Tenant's rights hereunder are and shall be subject and subordinate to all currently existing and future mortgages affecting the Premises. Within ten (10) days after the receipt of a written request from Landlord or any Landlord mortgagee, Tenant shall confirm such subordination by executing and delivering Landlord and Landlord's mortgagee a recordable subordination agreement and such other documents as may be reasonably requested, in form and content satisfactory to Landlord and Landlord's mortgagee. Provided, however, as a condition to Tenant's obligation to execute and deliver any such subordination agreement, the applicable mortgagee must agree that mortgagee shall not unilaterally, materially alter this Lease and this Lease shall not be divested by foreclosure or other default proceedings thereunder so long as Tenant shall not be in default under the terms of this Lease beyond any applicable cure period set forth herein. Tenant acknowledges that any Landlord mortgagee has the right to subordinate at any time its interest in this Lease and the leasehold estate to that of Tenant, without Tenant's consent.

(b) If Landlord sells, transfers, or conveys its interest in the Premises or this Lease, or if the same is foreclosed judicially or nonjudicially, or otherwise acquired, by a Landlord mortgagee, upon the request of Landlord or Landlord's successor, Tenant shall attorn to said successor, provided said successor accepts the Premises subject to this Lease. Tenant shall, upon the request of Landlord or Landlord's successor, execute an attornment agreement confirming the same, in form and substance acceptable to Landlord or Landlord's successor and Landlord shall thereupon be released and discharged from all its covenants and obligations under this Lease, except those obligations that have accrued prior to such sale, transfer or conveyance; and Tenant agrees to look solely to the successor in interest of Landlord for the performance of those covenants accruing after such sale, transfer or conveyance. Such agreement shall provide, among other things, that said successor shall not be bound by (a) any prepayment of more than one (1) month's rental (except the Security Deposit) or (b) any material amendment of this Lease made after the later of the Lease Commencement Date or the date that such successor's lien or interest first arose, unless said successor shall have consented to such amendment.

(c) Within ten (10) days after request from Landlord, Tenant shall execute and deliver to Landlord an estoppel certificate (to be prepared by Landlord and delivered to Tenant) with appropriate facts then in existence concerning the status of this Lease and Tenant's occupancy, and with any exceptions thereto noted in writing by Tenant. Tenant's failure to execute and deliver the Estoppel Certificate within said ten (10) day period shall be deemed to make conclusive and binding upon Tenant in favor of Landlord and any potential mortgagee or transferee the statements contained in such estoppel certificate without exception.

ABANDONMENT

27. Tenant shall not abandon the Premises at any time during the Lease term. If Tenant shall abandon the Premises or be dispossessed by process of law, any personal property belonging to Tenant and left on the Premises, at the option of Landlord, shall be deemed abandoned, and available to Landlord to use or sell to offset any rent due or any expenses incurred by removing same and restoring the Premises.

NOTICES

28. All notices required or permitted under this Lease shall be in writing and shall be personally delivered or sent by U.S. certified mail, return receipt requested, postage prepaid. Notices to Tenant shall be delivered or sent to the address shown at the beginning of this Lease, except that upon Tenant taking possession of the Premises, then the Premises shall be Tenant's address for such purposes. Notices to Landlord shall be delivered or sent to the address shown at the beginning of this Lease and notices to Agent, if any, shall be delivered or sent to the address set forth in Section 3 hereof. All notices shall be effective upon delivery. Any party may change its notice address upon written notice to the other parties, given as provided herein.

BROKERS

29. Except as expressly provided herein, Tenant and Landlord agree to indemnify and hold each other harmless from any and all claims of brokers, consultants or real estate agents by, through or under the indemnifying party for fees or commissions arising out of the lease of the Property to Tenant.

Tenant and Landlord represent and warrant to each other that: (i) except as to the brokers designated below ("Brokers"), they have not employed nor engaged any brokers, consultants or real estate agents to be involved in this transaction and (ii) that the compensation of the Brokers is established by and shall be governed by separate agreements entered into as amongst the Brokers, the Tenant and/or the Landlord.

("Listing Agent"),
Acting as: ☐ Landlord's Agent; ☐ Dual Agent
and

("Listing Agent" - License # _____)
Acting as: ☐ Tenant's Agent; ☐ Landlord's (Sub)Agent; ☐ Dual Agent

("Leasing Agent" - License # _____)
("Leasing Agent"),

GENERAL TERMS

30. (a) "Landlord" as used in this Lease shall include the undersigned, its heirs, representatives, assigns and successors in title to the Premises. "Agent" as used in this Lease shall mean the party designated as same in Section 3, its heirs, representatives, assigns and successors. "Tenant" shall include the undersigned and its heirs, representatives, assigns and successors, and if this Lease shall be validly assigned or sublet, shall include also Tenant's assignees or sublessees as to the Premises covered by such assignment or sublease. "Landlord", "Tenant", and "Agent" include male and female, singular and plural, corporation, partnership or individual, as may fit the particular parties.

(b) No failure of Landlord to exercise any power given Landlord hereunder or to insist upon strict compliance by Tenant of its obligations hereunder and no custom or practice of the parties at variance with the terms hereof shall constitute a waiver of Landlord's right to demand exact compliance with the terms hereof. All rights, powers and privileges conferred hereunder upon parties hereto shall be cumulative and not restrictive of those given by law.

(c) Time is of the essence in this Lease.

(d) This Lease may be executed in one or more counterparts, which taken together, shall constitute one and the same original document. Copies of original signature pages of this Lease may be exchanged via facsimile or e-mail, and any such copies shall constitute originals. This Lease constitutes the sole and entire agreement among the parties hereto and no modification of this Lease shall be binding unless in writing and signed by all parties hereto. The invalidity of one or more provisions of this Lease shall not affect the validity of any other provisions hereof and this Lease shall be construed and enforced as if such invalid provisions were not included.

(e) Each signatory to this Lease represents and warrants that he or she has full authority to sign this Lease and such instruments as may be necessary to effectuate any transaction contemplated by this Lease on behalf of the party for whom he or she signs and that his or her signature binds such party. The parties acknowledge and agree that: (i) the initials lines at the bottom of each page of this Lease are merely evidence of their having reviewed the terms of each page, and (ii) the complete execution of such initials lines shall not be a condition of the effectiveness of this Lease.

(f) Upon request by either Landlord or Tenant, the parties hereto shall execute a short form lease (memorandum of lease) in recordable form, setting forth such provisions hereof (other than the amount of annual rental and other sums due) as either party may wish to incorporate. The cost of recording such memorandum of lease shall be borne by the party requesting execution of same. The NC REALTOR Memorandum of Lease (Form 596-T) or an attorney-drafted memorandum of lease may be used for this purpose.

(g) If legal proceedings are instituted to enforce any provision of this Lease, the prevailing party in the proceeding shall be entitled to recover from the non-prevailing party reasonable attorneys fees and court costs incurred in connection with the proceeding.

SPECIAL STIPULATIONS

Note: Under North Carolina law, real estate agents are not permitted to draft lease provisions

☐ If this box is checked, additional terms of this Lease are set forth on **Exhibit B** attached hereto and incorporated herein by reference.

☐ If this box is checked, improvements to the Premises to be provided by Landlord are set forth on **Exhibit C** attached hereto and incorporated herein by reference.

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Tenant Initials MLW Landlord Initials MMH

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THIS DOCUMENT IS A LEGAL DOCUMENT. EXECUTION OF THIS DOCUMENT HAS LEGAL CONSEQUENCES THAT COULD BE ENFORCEABLE IN A COURT OF LAW. THE NORTH CAROLINA ASSOCIATION OF REALTORS® MAKES NO REPRESENTATIONS CONCERNING THE LEGAL SUFFICIENCY, LEGAL EFFECT OR TAX CONSEQUENCES OF THIS DOCUMENT OR THE TRANSACTION TO WHICH IT RELATES AND RECOMMENDS THAT YOU CONSULT YOUR ATTORNEY.

IN WITNESS WHEREOF, the parties hereto have hereunto caused this Lease to be duly executed.

LANDLORD:

Individual

Business Entity

Secretest Building, LLC
(Name of Firm)

Date: _____

By: Mary Helen Treece
Mary Helen Treece

Date: _____

Title: Owner

Date: 10/28/24

TENANT:

Individual

Business Entity

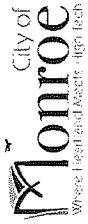
Matthew A. Wilson, LLC
(Name of Firm)

Date: _____

By: Matthew Wilson
Matthew Wilson

Title: President

Date: 10/28/24



Downtown Monroe

Blade/Suspension Sign Grant Application



Owner's Name: Matthew Wilson Date: 2/3/25
Owner's Mailing Address: 2730 Spout Branch Way Phone: 980-219-1228
Monroe, NC 28110

Email Address: Patty and the Dogs @ gmail.com
Building Name: The Secret Bulldog - Patty + the Dogs
Building Address: 217 N. Wayne St. Monroe, NC 28112
Building's Physical Address: 217 N. Wayne St.
Monroe, NC 28112

Name on Sign: Patty + the Dogs Special stenciling: _____
Background Color: White _____
Lettering Color: Black + Red _____
Will you need to stack signage: YES (NO) Type of Sign: Blade or Suspension
If YES, what other businesses are participating? _____

Please attach the following:
1) Written specifications outlining scope of work
2) Property Owners Approval Letter
3) Drawings of proposed signage and wall bracket
4) Sign Contractor estimate
INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED

Tenant's Name: Matthew Wilson Phone: 980-219-1228
Business Name: Patty And the Dogs

By providing this **Grant Application** to the City of Monroe, I hereby certify for the company that all the information provided is true and correct. I also agree to cooperate with the City of Monroe by providing such information and such access to our records as may be necessary to verify the enclosed information. I also understand that any facts found to be incorrect or false, will be grounds for termination of the incentive grant agreement.

Authorized Corporate Signature: Patty Date: 2/3/25
Please Print Name and Title: Matthew Wilson, President

City of Monroe—Downtown Monroe
113 West Morgan Street • Monroe, North Carolina 28112

- The City of Monroe reserves the right to withhold approval of the grant application if the signs are not deemed appropriated to the historic integrity of the structure
- This Grant cannot be used for window lettering, awnings, or vinyl signage

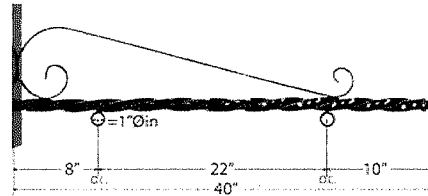
Procedure to receive a SGP

SGP applications may be submitted to the Downtown Monroe office at any time. Due to funding cycles, the award of grants begins with the fiscal year beginning July 1st of each year. Grants are awarded to eligible applicants until all funds are expended.

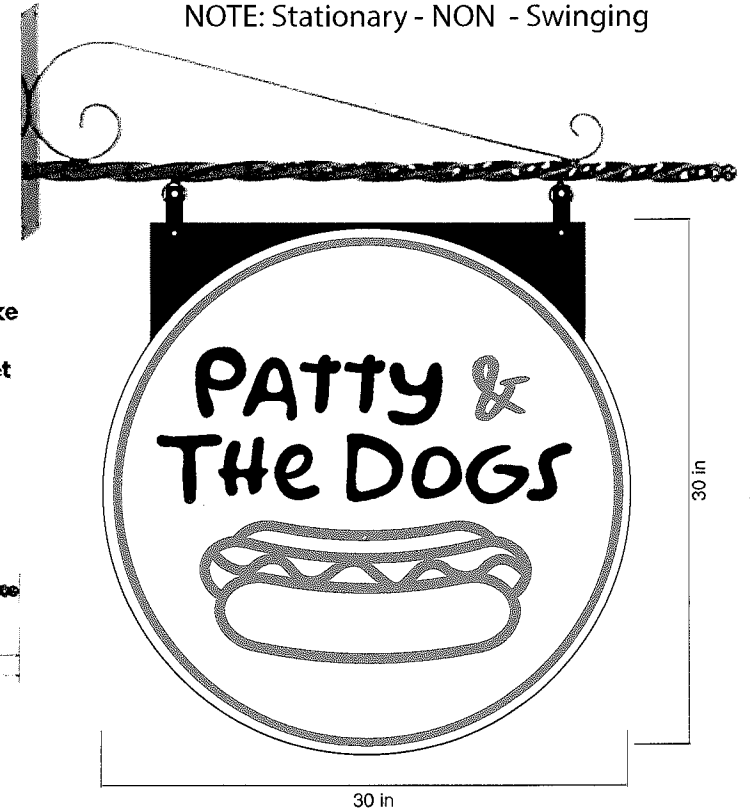
1. The Property Owner or Tenant submits a completed application, photographs, drawings, plans & specifications and contractors cost proposals to Downtown Monroe, City of Monroe. The package must be complete in order to qualify for funding.
2. Once Downtown Monroe, Planning and Development, City of Monroe reviews the project, the applicant will be notified of the status of the application. Construction may **not** begin until the project has been approved and a sign permit is issued.
3. This is a cost reimbursement grant program. Grant monies will be approved upon completion of the project as certified by Downtown Monroe, City of Monroe that the work completed substantially conforms to the pre-approved plans and the project is eligible for the grant payments. Grant monies will be disbursed once the Downtown Monroe office receives copies of all invoices plus a copy of cancelled checks showing proof of payment and after the project has been inspected. It takes approximately 2-4 weeks after approval of the project to receive reimbursement.



**41 inch Deluxe
Heavy Duty
Scroll Bracket
Dimensions**



Qty. 1 - custom scroll bracket 41"
with custom routed 6mm Max Metal/ACM
2 sided sign face with vinyl overlays
NOTE: Stationary - NON - Swinging



Blue Roots Marketing
PO Box 79315 Charlotte, NC 28271
(980) 256-4819

www.bluerootsmarketing.com



Work Order # 11163

Manufacture - Install - Patty and the Dogs -
Monroe, NC

SALES REP INFO
LaDanna Roberts
Sign Division Operations Manager
ladanna@bluerootsmarketing.com
QT#
11221

WORK ORDER
DATE
02/04/2025
TERMS
Due on receipt

DUE
DATE
02/28/
2025

CONTACT INFO
Matthew Wilson
pattyandthedogs@gmail.com
(980) 219-1228

PDM
Amanda Burke

ORDERED BY
Matt Wilson, LLC dba Patty and the Dogs
217 North Hayne Street
Monroe, NC 28112

INSTALL ADDRESS
217 North Hayne Street
Monroe, NC 28112

ITEM

1 Sign Installation

Installation:

- Install bracket with hardware
- Mount sign to bracket with hanging chains

Material

Sign Supplies 0.0 Set(s)

LaborRate

Under 30'

MachineRate

Excavator 0.0 Hr

2 Flatbed Printing

Custom Sign:

- Latex Printed 24" Round Sign
- Full-Color UV Printed
- Weather Resistant

Material

UV Ink - Outdoor

ACM - 6mm

LaborRate

Basic Setup

STATE	QTY	UOM	TAXABLE
New	1	Each	Y

New	1	Each	Y
-----	---	------	---

Blue Roots Marketing
PO Box 79315 Charlotte, NC 28271
(980) 256-4819

www.bluerootsmarketing.com



Down Payment Invoice # 11163

Manufacture - Install - Patty and the Dogs -
Monroe, NC

SALES REP INFO
LaDanna Roberts
Sign Division Operations Manager
ladanna@bluerootsmarketing.com

SALES ORDER
DATE
02/04/2025
TERMS
Due on receipt

QT#
11221

ORDERED BY
Matt Wilson, LLC dba Patty and the Dogs
217 North Hayne Street
Monroe, NC 28112

CONTACT INFO
Matthew Wilson
pattyandthedogs@gmail.com
(980) 219-1228

INSTALL ADDRESS
217 North Hayne Street
Monroe, NC 28112

QUANTITY

QTY	UOM	U.PRICE	TOTAL (EXCL. TAX)
1	Each	\$380.00	\$380.00

1 Sign Installation Installation:

- Install bracket with hardware
- Mount sign to bracket with hanging chains

2 Flatbed Printing Custom Sign:

- Latex Printed 24" Round Sign
- Full-Color UV Printed
- Weather Resistant

1	Each	\$396.00	\$396.00
---	------	----------	----------

Subtotal	\$776.00
Sales Tax (7.25%):	\$56.26
Paid	\$0.00
Net Due	\$832.26

Down Payment (50.0 %):

\$416.13

Total:

\$832.26

SIGNATURE

DATE

The customer is solely responsible for reading and correcting any errors in any proofs provided for the project. We require you to review and sign a proof prior to starting any job. By signing off on the proof, you give Blue Roots Marketing approval to begin work on your order. An order can not be canceled after materials are ordered, assembled or work has begun. All deadline agreements are contingent upon receiving art approval and material selections in a timely manner and excludes delays beyond our control. Blue Roots Marketing LLC "BRM" will not be held liable for any copyright infringement on a design submitted to us. All printed graphics are intended to be viewed at a distance greater than 8 feet. If specific color matching is requested customer is to provide RGB or CMYK color values. Atmospheric changes at time of print can alter final color. Due to this BRM can not guarantee the colors will match what is viewed on a computer screen. When applying or removing vinyl to any surface BRM is not responsible for any pre-existing paint failure conditions, lifting of paint, chipped paint etc. Further more BRM isn't liable for any repair responsibilities and or cost for the repairs. Acceptance of Proposal: The above prices, specifications and conditions are satisfactory and are hereby accepted. This contract will act as a personal guarantee by the customer specified under "Bill To". Upon customer approval all sales are final. A 50% down payment is required before starting the project. Payment for product is due in full prior to delivery or pickup. A \$25 fee will be accessed on all returned checks. Invoices that remain unpaid for 30 days will begin to accrue interest on the unpaid balance at the rate of one and one half (1.5%) per month or the maximum amount permitted by law plus associated expenses to collect including attorneys fees.

Blade/Suspension Signage Grant

Purpose:

The purpose of the Signage Grant (SG) is to encourage and stimulate the introduction of a uniformed, pedestrian-oriented signage into the Central Business. This grant specifically assists in funding a signage project up to \$250 of the total cost. There are design restrictions such as dimensions, color, and location to ensure the preservation of Downtown Monroe's unique architectural characteristics is maintained.

Definition:

A **Blade sign** is constituted as a sign which hangs perpendicular from the front of a business.

A **Suspending Sign** is any sign which is affixed to and supported by an awning or canopy.

Both types of signs alert pedestrians approaching, from a distance, as to the type of merchandise or service that you provide. Ideally a blade sign will say café or ladies boutique instead of the proprietary name that does not convey what your business is about. For example, instead of saying Sally's Boutique, the sign would say "Trending Fashion."

Criteria:

- One (1) Per Façade per business
- Blade and suspending signs shall not be used on the same façade
- Bottom of the sign must be at least 8ft above the sidewalk to eliminate any contact with pedestrian activity.
- Must be mounted below the second floor
- Blade Signs must not extend more than 4 ft. from the building's façade. Suspension signs must not extend more than 5 feet from the building wall or 2/3 of the width of the sidewalk measured from the building.

Sign Specifications

- Signs must have exact wording on both sides to attract pedestrians coming from both directions
- In order to be approved for this grant the sign must be no more than 3 sq. ft.
- Stacking signs are allowed for multi-business storefronts

Guidelines

- Signs must conform to the City of Monroe's Downtown CBD Sign Ordinance.
- Signs must be designed, manufactured, and installed by a professional, sign company/contractor
- Grants are contingent upon final design approval from City of Monroe.



CITY OF MONROE

STAFF REPORT

TO: Downtown Advisory Board

VIA: Jeff Wells, Assistant City Manager

DATE: February 19, 2025

FROM: Donna O'Keefe, Downtown Manager

SUBJECT: Meet Me Downtown Economic Incentive Grant for Presson Art Gallery, 115 S. Main Street Suite 100, owner James Scott Purdy.

SUMMARY STATEMENT

The Downtown Advisory Board is requested to consider and recommend to City Council a Meet Me Downtown Economic Development Incentive Grant for The Presson Art Gallery at 115 S. for 200 N. Main Street, owner James Scott Purdy.

REVIEW

The Meet Me Downtown Incentive was created to assist quality businesses wishing to locate or relocate Downtown. This program is designed to help with the marketing and advertising of new businesses in order to establish their presence in Downtown and brand Downtown Monroe. This incentive is a 50-50 matching grant. New businesses opening in downtown may apply for up to 50% of the per business cost of their current advertising and marketing budget.

The Presson Art Gallery owner, James Scott Purdy, opened this retail art gallery on March 15, 2024. The new business occupies approximately 2,930 square feet of retail space and is in Monroe's Central Business District. Grant funds for the Meet Me Downtown Grant cannot exceed \$5,000 and are paid out upon proof of paid invoices for any marketing material proposed in the grant application.

The applicant has provided all of the required documents and paid invoices totaling \$5047.00 and are eligible for 50% in reimbursement or \$2523.50.

RECOMMENDATION

Staff request the Downtown Advisory Board recommend to City Council award The Presson Art Gallery a Meet Me Downtown Incentive Grant to owner James Scott Purdy in the amount of \$2523.50.

Attachment:
Application
Paid Invoices
Business Plan



Downtown Monroe Meet Me Downtown Application



Business Name: Presson Art Gallery Owner's Name: James Scott Purdy
Mailing Address: 1619 Waxhaw Indian Physical Address: 113/115 Main St, Monroe, NC 28112
Trail Road South Date: 6/9/22
Waxhaw, NC 28173 Phone: 704-998-7191

Select from the following (retail / restaurant / other beyond retail-restaurant) other beyond 50
If Other list here: Art Gallery AMOUNT REQUESTED: \$ 2,523.

Approximate cost to open business: \$ 2,500,000
Personal Investment (equity): \$ 1,300,000
Bank or other financial commitment: \$ 850,000
Building Rehabilitation: \$ 797,200

Number of new jobs: 3
Expected daily traffic: 120
Days and hours operation: _____
If less than 30hrs/ week, please explain why

Days Open Thur, Fri, Sat - 10:30-7 + Art Classes 3 Days / wk. 130 Hrs
Monthly Rent/Lease \$ _____ Additional Space provided if Expansion _____ Sq. Ft.

Business Owners Background: _____
(May be included on additional sheet if necessary)

OTHER: In a paragraph or less explain why you feel this grant is important to the continuing efforts of revitalizing downtown Monroe and what role you play in that process.

The Presson Art Gallery will contribute to Monroe's revitalization effort in 2 very important ways. First by providing a destination event which will attract both the novice artist and patrons from varying ethnicities to visit downtown Monroe. There is also an educational opportunity that will foster and encourage younger and older generations to develop their own talent as a vocation or just create art for the enjoyment.

Who is your target market? _____

This is a 50/50 matching grant. All applicants must attach a copy of your business plan and/or marketing plan and budget for the year. A Business Plan Template is available to assist with the creation of a business plan.

The City of Monroe will determine if the business plan and/or marketing plan is sufficient. If the plan submitted is not sufficient, the City may offer \$500 (separate from the marketing/advertising assistance sought) as matching funds towards the completion of a suitable marketing plan. A list of marketing providers located in Downtown Monroe can be provided; any marketing firm can be utilized.

Business Owner: _____ Date: 6-9-22
Property Owner: _____ Date: 6-9-22

PROJECT DESCRIPTION

The two-story 4,000 SF Presson Building will be rehabilitated to accommodate three residential apartments on the upper level with exterior balconies fronting onto Correll Street. A fine arts gallery with supporting offices will be located on the ground level. These uses will require structural modifications to the perimeter wall footings and also to interior support piers and lentels. Entrances and exits have been strategically located to meet code regulations.

Exterior improvements include a new roof system, window and storefront modifications, repairs of existing exterior stonework, tuck pointing of existing failed mortar joints.

For a more detailed description, see the following Summary of Work & architectural drawings.

Summary of Work

Repairs and alterations to an existing two-story type IIIB structure originally constructed circa 1941 with exterior mass walls constructed of built in-place composite stone masonry, concrete and brick masonry with conventional joist and rafter framing and boards for roof sheathing and subfloor for the second floor.

The first story assembly and business occupancy space will be repaired and altered with new construction with tenant up-fit requirements for an art gallery and offices. Existing walls are patched and repaired with new finishes. New ADA restrooms with new toilets and laboratories are to be provided. New fire sprinkler system will also be installed per building code.

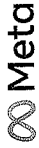
Existing second floor construction will be completed with gypsum board ceilings installed to complete the horizontal fire separation requirement.

The first and second floor residential occupancy is to be completed as shown to obtain a certificate of occupancy and subsequently occupied as soon as construction is completed.

Facade repairs include cleaning of existing exterior stonework, tuck pointing of existing failed mortar joints including repair of structural cracking in exterior walls, patching and repair of interior surfaces of exterior walls due to water intrusion, repair and patching of reinforced concrete headers for doors and sills for window openings as preparation for new construction and alterations. Alterations include new openings in the mass walls, infilling selected openings in mass walls and installation of pressure treated wood blocking for new doors and windows, modifications to floor and roof framing to accommodate new egress stair construction and interior alterations to mass walls for installation of insulation and finishes.

The work includes selective demolition requirements including removal of existing first floor granular fill, subframing and wood subflooring, removal and salvage of existing equipment, removal and re-use of existing wood joists and rafters, removal of existing wall areas for new wall openings and infilling selected existing openings. A new reinforced concrete slab with thickened slab edges is required along with altering existing concrete column footings, new concrete foundations for new interior and exterior steel columns, new steel columns and beams, miscellaneous wood and steel framing and steel fabrications, repairs and alterations to existing stone and concrete/masonry wall construction and new exterior cold form steel wall framing.

New construction includes new concrete slab, new floor and roof framing in selected areas for new openings and infill of existing openings, construction of new rated and non-rated walls and partitions, floor, wall and ceiling finishes, suspended gypsum board ceilings and mechanical and electrical systems, sun shading devices, protective cover at entry, construction of exterior second floor balconies and an enclosed stair landing/entry area cover.



Receipt for Audrey Allen
Account ID: 382930019757041

Invoice/Payment Date
Mar 4, 2024, 4:42 PM

Payment method
MasterCard · 2347
Reference Number: JLPBN2LGB2

Transaction ID
6992117717567239-694895465216800

Product Type
Meta ads

marketing

Paid

\$125.00 USD

You're being billed because you reached your \$125.00 payment threshold.

Campaigns

Event: Presson Gallery Grand Opening From Feb 28, 2024, 12:00 AM to Mar 4, 2024, 4:42 PM		\$36.73
Event: Presson Gallery Grand Opening	4,202 Impressions	\$36.73
Instagram post: It's official! Save the date for... From Feb 28, 2024, 12:00 AM to Mar 4, 2024, 4:42 PM		\$47.57
Instagram Post	5,155 Impressions	\$47.57
Instagram post: Another stunning sneak peek of... From Feb 28, 2024, 12:00 AM to Mar 4, 2024, 4:42 PM		\$18.99
Instagram Post	1,582 Impressions	\$18.99
Instagram post: Tune in to our recent radio... From Feb 28, 2024, 12:00 AM to Mar 4, 2024, 4:42 PM		\$2.32
Instagram Post	211 Impressions	\$2.32
Instagram post: Don't miss our radio interview on... From Feb 28, 2024, 12:00 AM to Mar 4, 2024, 4:42 PM		\$19.39
Instagram Post	1,567 Impressions	\$19.39

Total Expense
\$5047.00

Meta Platforms, Inc.
1601 Willow Road
Menlo Park, CA 94025-1452
United States

Presson Gallery
115 S MAIN ST
manteo, NC 28112
United States

Fwd: Your Meta ads receipt (Account ID: 382930019757041)

Audrey Allen <apurdy1663@gmail.com>

Thu 2/29/2024 10:11 PM

To: pressonartgallery@gmail.com <pressonartgallery@gmail.com>

Sent from my Verizon, Samsung Galaxy smartphone
Get Outlook for Android

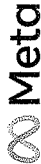
marketing

From: Meta for Business <advertise-noreply@support.facebook.com>

Sent: Thursday, February 29, 2024 2:56:32 AM

To: Audrey Allen <apurdy1663@gmail.com>

Subject: Your Meta ads receipt (Account ID: 382930019757041)



Receipt for:
Audrey Allen (382930019757041)

Transaction ID:
6968012376644439-
6941060862672923

Payment summary

Amount billed

\$75.00 USD

Billing reason

You're being billed because you reached your
\$75.00 payment threshold.

Date range

Feb 25, 2024, 12:00 AM - Feb
28, 2024, 11:56 PM

Product type

Meta ads

Payment method

MasterCard · 2347

Reference number ⓘ

FCRSPXTFB2

Campaign	Results	Amount
Event: Presson Gallery Grand Opening	3,481 Impressions	\$28.41
Instagram post: It's official! Save the date for...	1,429 Impressions	\$11.81
Instagram post: Another stunning sneak peek of...	2,034 Impressions	\$25.27

Fwd: Your Meta ads receipt (Account ID: 382930019757041)

Audrey Allen <apurdy1663@gmail.com>

Thu 2/29/2024 10:13 PM

To: pressonartgallery@gmail.com <pressonartgallery@gmail.com>

Sent from my Verizon, Samsung Galaxy smartphone
Get Outlook for Android

marketing

From: Meta for Business <advertise-noreply@support.facebook.com>

Sent: Sunday, February 25, 2024 2:29:59 PM

To: Audrey Allen <apurdy1663@gmail.com>

Subject: Your Meta ads receipt (Account ID: 382930019757041)



Receipt for:

Audrey Allen (382930019757041)

Transaction ID:

6949864265125921-
6949864281792586

Payment summary

Amount billed

\$50.00 USD

Billing reason

You're being billed because you reached your \$50.00 payment threshold.

Date range

Feb 21, 2024, 12:00 AM - Feb 25, 2024, 11:29 AM

Product type

Meta ads

Payment method

MasterCard · 2347

Reference number ⓘ

Q6CVBXPFB2

Campaign	Results	Amount
Event: Presson Gallery Grand Opening	3,779 Impressions	\$27.06
Instagram Post	107 Impressions	\$1.35
Instagram post: It's official! Save the date...	1,912 Impressions	\$16.85

Fwd: Your Meta ads receipt (Account ID: 382930019757041)

Audrey Allen <apurdy1663@gmail.com>

Mon 2/19/2024 7:09 AM

To: pressonartgallery@gmail.com <pressonartgallery@gmail.com>

Get Outlook for iOS

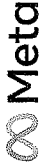
marketing

From: Meta for Business <advertise-noreply@support.facebook.com>

Sent: Sunday, February 18, 2024 8:17:07 PM

To: Audrey Allen <apurdy1663@gmail.com>

Subject: Your Meta ads receipt (Account ID: 382930019757041)



Receipt for:
Audrey Allen (382930019757041)

Transaction ID:
6928763467235998-
6921601984618816

Payment summary

Amount billed

\$50.00 USD

Date range

Feb 16, 2024, 12:00 AM - Feb 18, 2024, 5:16 PM

Billing reason

You're being billed because you reached your \$50.00 payment threshold.

Product type

Meta ads

Payment method

MasterCard · 2347

Reference number

4L4FBXTFB2

Campaign

Results

Amount

Instagram post: It's getting real! 🌟
Everyone is...

1,352
Impressions

\$15.95

Post: "It's official! Save the date for the Grand..."

2,169
Impressions

\$15.66

Instagram post: It's official! Save the date for...

832
Impressions

\$9.26

Post: " 🌟 🌟 Get ready to immerse yourself in a world of..."

2,911
Impressions

\$7.52

Fwd: Your Meta ads receipt (Account ID: 382930019757041)

Audrey Allen <apurdy1663@gmail.com>

Tue 2/20/2024 9:35 AM

To: pressonartgallery@gmail.com <pressonartgallery@gmail.com>

[Get Outlook for iOS](#)

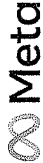
marketing

From: Meta for Business <advertise-noreply@support.facebook.com>

Sent: Tuesday, February 20, 2024 7:12:05 AM

To: Audrey Allen <apurdy1663@gmail.com>

Subject: Your Meta ads receipt (Account ID: 382930019757041)



Receipt for:

Audrey Allen (382930019757041)

Transaction ID:

7014514408660907-
6965590440219972

Payment summary

Amount billed

\$50.00 USD

Date range

Feb 18, 2024, 12:00 AM - Feb
20, 2024, 4:11 AM

Billing reason

You're being billed because you reached your
\$50.00 payment threshold.

Product type

Meta ads

Payment method

MasterCard · 2347

Reference number ⓘ

NDG9EXBGB2

Campaign

Results

Amount

Instagram Post

551
Impressions

\$7.02

Event: Presson Gallery Grand Opening

1,253
Impressions

\$9.31

Post: "It's official! Save the date for the
Grand..."

701
Impressions

\$5.55

Post: "🌌 Get ready to immerse
yourself in a world of..."

2,216
Impressions

\$6.87

PRIME DIRECTORY SERVICES Transaction Receipt

billing@primedirectoryservices.com <billing@primedirectoryservices.com>

Tue 2/27/2024 11:28 AM

To: pressonartgallery@gmail.com <pressonartgallery@gmail.com>

PRIME DIRECTORY SERVICES



Your card sale is complete! Below is your receipt with all relevant transaction information.

Transaction Receipt



Feb 27, 2024
11:28:21 AM EST

\$399.99

Type	Card Sale
Transaction ID	9256912146
Auth Code	176615

Billing Details

James Scott Purdy
Presson Gallery

Shipping Details

US

1619 Waxhaw Indian Trail Road
South Waxhaw , NC 28173
US

pressonartgallery@gmail.com

marketing



Payment details



Brooklyn Banks
"Social Media Marketing"

- \$550

marketing

Social activity



Status
Complete

Payment method



Mastercard Debit
Debit •••• 2347

Transaction details

March 27, 2024 2:48 PM • Private

Paid to

@Brooklyn-Banks-10

Type of transaction

Payments between friends

Transaction ID

4033220189676350258



Payment details



Brooklyn Banks
"Social Media Marketing"

- \$274.95

marketing

Social activity



Status

Complete

Payment method



Mastercard Debit

Debit 2347

Transaction details

March 14, 2024 8:06 PM · Private

Paid to

@Brooklyn-Banks-10

Type of transaction

Payments between friends

Transaction ID

4023958300311869077



Receipt for Audrey Allen

Account ID: 382930019757041

marketing

Invoice/Payment Date
Mar 19, 2024, 8:06 PM

Payment method
MasterCard · 2347
Reference Number: C9BSVY7GB2

Transaction ID
7050534781725532-7387289178050096

Paid

\$175.00 USD

You're being billed because you reached your \$175.00 payment threshold.

Product Type
Meta ads

Campaigns

Event: Presson Gallery Grand Opening
From Mar 4, 2024, 12:00 AM to Mar 19, 2024, 8:00 PM

\$83.61

Event: Presson Gallery Grand Opening

10,050 Impressions

\$83.61

Instagram post: It's official! Save the date for...

From Mar 4, 2024, 12:00 AM to Mar 19, 2024, 8:00 PM

\$42.06

Instagram Post

3,824 Impressions

\$42.06

Instagram post: Don't miss our radio interview on...

From Mar 4, 2024, 12:00 AM to Mar 19, 2024, 8:00 PM

\$22.61

Instagram Post

2,327 Impressions

\$22.61

Post: "Exciting News! The grand opening of our..."

From Mar 4, 2024, 12:00 AM to Mar 19, 2024, 8:00 PM

\$15.00

Post: "Exciting News! The grand opening of our..."

998 Impressions

\$15.00

Instagram post: Exciting News! The grand...

From Mar 4, 2024, 12:00 AM to Mar 19, 2024, 8:00 PM

\$1.64

Instagram Post

177 Impressions

\$1.64

Instagram post: Exciting News Alert! We...

From Mar 4, 2024, 12:00 AM to Mar 19, 2024, 8:00 PM

\$3.53

Instagram Post

276 Impressions

\$3.53

Instagram post: What an incredible night! Our...

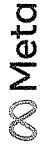
From Mar 4, 2024, 12:00 AM to Mar 19, 2024, 8:00 PM

\$6.55

Instagram Post

522 Impressions

\$6.55



Receipt for Audrey Allen
Account ID: 382930019757041

marketing

Invoice/Payment Date
Apr 21, 2024, 12:10 PM

Payment method
MasterCard · 2347
Reference Number: LEH6ZYXFB2

Transaction ID
7143414822437529-7182868741825467

Product Type
Meta ads

Paid

\$200.00 USD

You're being billed because you reached your \$200.00 payment threshold.

Campaigns

Instagram post: ☐ ☐ ☐ ☐ Exciting News Alert! ☐ ☐ ☐ ☐ ☐ We...

From Mar 21, 2024, 12:00 AM to Apr 21, 2024, 12:10 PM

Instagram Post

1,628 Impressions

\$19.87

Instagram post: ☐ ☐ What an incredible night! Our...

From Mar 21, 2024, 12:00 AM to Apr 21, 2024, 12:10 PM

Instagram Post

193 Impressions

\$2.56

Instagram post: ☐ ☐ Mark your calendars! ☐ ☐ Join us...

From Mar 21, 2024, 12:00 AM to Apr 21, 2024, 12:10 PM

Instagram Post

8,579 Impressions

\$78.00

Event: Presson Gallery's First Open Studio @ Monroe's Car Cruise-In

From Mar 21, 2024, 12:00 AM to Apr 21, 2024, 12:10 PM

Event: Presson Gallery's First Open Studio @ Monroe's Car Cruise-In

7,092 Impressions

\$26.00

Instagram post: ☐ ☐ ☐ ☐ There are some exciting things...

From Mar 21, 2024, 12:00 AM to Apr 21, 2024, 12:10 PM

Instagram Post

870 Impressions

\$9.98

Instagram post: ☐ ☐ Exciting news! ☐ ☐ Get ready to...

From Mar 21, 2024, 12:00 AM to Apr 21, 2024, 12:10 PM

Instagram Post

933 Impressions

\$14.24

Instagram post: ☐ ☐ Join us for another Open Studio...

From Mar 21, 2024, 12:00 AM to Apr 21, 2024, 12:10 PM

Instagram Post

120 Impressions

\$1.00

Post: "☐ ☐ Join us for an artistic extravaganza at Open..."

From Mar 21, 2024, 12:00 AM to Apr 21, 2024, 12:10 PM

\$8.22



Payment details



marketing

Brooklyn Banks
"Social Media Marketing"
- \$550

Social activity



Status
Complete

Payment method



Mastercard Debit
Debit 2347

Transaction details

April 29, 2024 10:56 AM · Private

Paid to

@Brooklyn-Banks-10

Type of transaction

Payments between friends

Transaction ID

4057020760653090573



Receipt for Audrey Allen
Account ID: 382930019757041

Invoice/Payment Date
May 29, 2024, 3:07 AM

Payment method
MasterCard · 2347
Reference Number: N25ZX2QFB2

Transaction ID
7358869630892043-7387711571341184

Product Type
Meta ads

Paid

\$200.00 USD

You're being billed because you reached your \$200.00 payment threshold.

marketing

Campaigns

Event: Presson Gallery Open Studio
From May 21, 2024, 12:00 AM to May 29, 2024, 3:07 AM

Event: Presson Gallery Open Studio

Instagram post: ☐☐☐☐ Get ready for a unique and...
From May 21, 2024, 12:00 AM to May 29, 2024, 3:07 AM

Instagram Post

Instagram post: ☐☐☐☐ Join us on June 15th from 11...
From May 21, 2024, 12:00 AM to May 29, 2024, 3:07 AM

Instagram Post

Event: Presson Gallery Open Studio
From May 21, 2024, 12:00 AM to May 29, 2024, 3:07 AM

Event: Presson Gallery Open Studio

Event: Canvas Shuffle: A Paint Party
From May 21, 2024, 12:00 AM to May 29, 2024, 3:07 AM

Event: Canvas Shuffle: A Paint Party

Post: ☐☐☐☐ Join us on June 15th from 11 AM - 12 PM for...
From May 21, 2024, 12:00 AM to May 29, 2024, 3:07 AM

Post: ☐☐☐☐ Join us on June 15th from 11 AM - 12 PM for...

\$8.65

\$8.65

\$106.46

\$106.46

\$35.40

\$35.40

\$10.15

\$10.15

\$10.01

\$10.01

\$29.33

\$29.33

846 Impressions

13,929 Impressions

6,728 Impressions

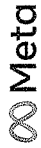
1,091 Impressions

934 Impressions

1,487 Impressions

Meta Platforms, Inc.
1601 Willow Road
Menlo Park, CA 94025-1452
United States

Presson Gallery
115 S MAIN ST
moreno, NC 28112
United States



Receipt for Audrey Allen

Account ID: 382930019757041

marketing

Invoice/Payment Date
May 5, 2024, 5:19 AM

Payment method
MasterCard · 2347
Reference Number: 2JDD62UFB2

Transaction ID
7583415088437503-7273599852752357

Product Type
Meta ads

Paid

\$200.00 USD

You're being billed because you reached your \$200.00 payment threshold.

Campaigns

Post: "□□ Join us for an artistic extravaganza at Open..." From Apr 21, 2024, 12:00 AM to May 5, 2024, 5:19 AM		\$30.39
Post: "□□ Join us for an artistic extravaganza at Open..." From Apr 21, 2024, 12:00 AM to May 5, 2024, 5:19 AM	2,058 Impressions	\$30.39
Post: "□□ Exciting news! □□ Get ready to enhance your..." From Apr 21, 2024, 12:00 AM to May 5, 2024, 5:19 AM		\$9.99
Post: "□□ Exciting news! □□ Get ready to enhance your..." From Apr 21, 2024, 12:00 AM to May 5, 2024, 5:19 AM	330 Impressions	\$9.99
Post: "□□ Get ready to dive into the vibrant world of..." From Apr 21, 2024, 12:00 AM to May 5, 2024, 5:19 AM		\$25.36
Post: "□□ Get ready to dive into the vibrant world of..." From Apr 21, 2024, 12:00 AM to May 5, 2024, 5:19 AM	5,135 Impressions	\$25.36
Instagram post: □□ Get ready to dive into the vibrant world of... From Apr 21, 2024, 12:00 AM to May 5, 2024, 5:19 AM		\$12.40
Instagram Post	1,653 Impressions	\$12.40
Instagram post: □□ Exciting news! □□ Get ready to... From Apr 21, 2024, 12:00 AM to May 5, 2024, 5:19 AM		\$7.41
Instagram Post	333 Impressions	\$7.41
Instagram post: □□ Join us for an artistic... From Apr 21, 2024, 12:00 AM to May 5, 2024, 5:19 AM		\$61.87
Instagram Post	5,081 Impressions	\$61.87
Post: "□□□□ Important Announcement: Extending Open Studio..." From Apr 21, 2024, 12:00 AM to May 5, 2024, 5:19 AM		\$25.66
Post: "□□□□ Important Announcement: Extending Open Studio..." From Apr 21, 2024, 12:00 AM to May 5, 2024, 5:19 AM	1,515 Impressions	\$25.66
Instagram post: □□ Dive into the colorful world of... From Apr 21, 2024, 12:00 AM to May 5, 2024, 5:19 AM		\$1.95

marketing



Brooklyn Banks

"Social Media Marketing Services"

- \$550

Social activity



Status
Complete

Payment method



Mastercard Debit
Debit 2347

Transaction details

May 25, 2024 5:44 PM · Private

Paid to

@Brooklyn-Banks-10

Type of transaction

Payments between friends

Transaction ID

4076070589886642060



Payment details

○○○

marketing



Brooklyn Banks
"Social Media Marketing"
- \$550

Social activity



Status
Complete

Payment method



Mastercard Debit
Debit •••• 2347

Transaction details

June 28, 2024 8:38 AM • Private

Paid to

@Brooklyn-Banks-10

Type of transaction

Payments between friends

Transaction ID

4100438300657515272

marketing

Fwd: Your Meta ads receipt (Account ID: 382930019757041)

Audrey Allen <apurdy1663@gmail.com>

Mon 6/10/2024 10:24 PM

To: audreyallen@pressonartgallery.com <audreyallen@pressonartgallery.com>

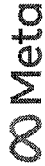
Sent from my Verizon, Samsung Galaxy smartphone
Get Outlook for Android

From: Meta for Business <advertise-noreply@support.facebook.com>

Sent: Saturday, June 8, 2024 8:30:37 PM

To: Audrey Allen <apurdy1663@gmail.com>

Subject: Your Meta ads receipt (Account ID: 382930019757041)



Receipt for:
Audrey Allen (382930019757041)

Transaction ID:
7409098252535847-7440661376046207

Payment summary

Amount billed
\$200.00 USD

Date range
May 28, 2024, 12:00 AM - Jun 8, 2024, 5:29 PM

Billing reason
You're being billed because you reached your
\$200.00 payment threshold.

Product type
Meta ads

Payment method
MasterCard · 2347

Reference number ⓘ
58BYD6LGB2

Campaign	Results	Amount
Event: Canvas Shuffle: A Paint Party	1,931 Impressions	\$19.99
Event: Presson Gallery Open Studio	2,193 Impressions	\$17.56
Event: Presson Gallery Open Studio	1,617 Impressions	\$14.62

Receipt for Audrey Allen

Account ID: 382930019757041

Invoice/Payment Date
Jun 20, 2024, 6:34 AM

Payment method
MasterCard · 2347
Reference Number: 8TXE64UFB2

Transaction ID
7497467660365574-7460112294101113

Product Type
Meta ads

Paid

\$200.00 USD

You're being billed because you reached your \$200.00 payment threshold.

marketing

Campaigns

Event: Presson Gallery Open Studio
From Jun 8, 2024, 12:00 AM to Jun 20, 2024, 6:34 AM

\$5.70

Event: Presson Gallery Open Studio

853 Impressions

\$5.70

Event: Presson Gallery Open Studio
From Jun 8, 2024, 12:00 AM to Jun 20, 2024, 6:34 AM

\$9.11

Event: Presson Gallery Open Studio

1,223 Impressions

\$9.11

Instagram post: Immerse yourself in the vibrant...
From Jun 8, 2024, 12:00 AM to Jun 20, 2024, 6:34 AM

\$6.10

Instagram Post

271 Impressions

\$6.10

Instagram post: Join us for "The Art of Polaroid"...
From Jun 8, 2024, 12:00 AM to Jun 20, 2024, 6:34 AM

\$33.81

Instagram Post

5,580 Impressions

\$33.81

Instagram post: ☐ ☐ ☐ Join us on June 15th from 11...
From Jun 8, 2024, 12:00 AM to Jun 20, 2024, 6:34 AM

\$5.94

Instagram Post

937 Impressions

\$5.94

Instagram post: ☐ ☐ Explore the process of creating...
From Jun 8, 2024, 12:00 AM to Jun 20, 2024, 6:34 AM

\$30.00

Instagram Post

5,597 Impressions

\$30.00

Post: "☐ You're invited to Summer Soirée: A Night of..."
From Jun 8, 2024, 12:00 AM to Jun 20, 2024, 6:34 AM

\$64.34

Post: "☐ You're invited to Summer Soirée: A Night of..."

\$64.34

Instagram post: ☐ You're invited to Summer...
From Jun 8, 2024, 12:00 AM to Jun 20, 2024, 6:34 AM

\$34.31

ACC AGENCY LLC.
58 E. Brooklyn Village Ave. Charlotte, NC 28202

INVOICE

marketing

Presson Art Gallery

Invoice # 0000079

Invoice Date 06/27/2024

Due Date 07/01/2024

Item	Description	Unit Price	Quantity	Amount
Service	Social Media Services (Custom Package)	550.00	1.00	550.00
NOTES: NOTES: To bypass fees, you have the option to pay using any of the following methods: Zelle: 317-649-5421 PayPal: @bbanks13 Cash App: \$bbanks1397 Venmo: @brooklyn-banks-10				
Subtotal				550.00
Total				550.00
Amount Paid				0.00
Balance Due				\$550.00

PAID - see 2nd page

marketing



< Payment details ⓘ

Brooklyn Banks
"Social Media Marketing"
- \$550

Social activity

♥ 0 👤 0

Status
Complete

Payment method

Mastercard Debit
Debit 2347

Transaction details

June 28, 2024 8:38 AM · Private

Paid to

@Brooklyn-Banks-10

Type of transaction

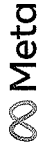
Payments between friends

Transaction ID

4100438300657515272

Need help?





Receipt for Audrey Allen

Account ID: 382930019757041

Invoice/Payment Date
Sep 22, 2024, 12:19 AM

Payment method
MasterCard · 2347
Reference Number: GE5DY84GB2

Transaction ID
7995549687224034-8039674976144835

Product Type
Meta ads

Paid

\$98.17 USD

Ads spend since Sep 15, 2024.

marketing

Campaigns

Event: The Carolina Beat Reception & Auction

From Sep 15, 2024, 12:00 AM to Sep 20, 2024, 11:59 PM

\$5.68

Event: The Carolina Beat Reception & Auction

1,321 Impressions

\$5.68

Instagram post: ☐ ☐ **Host a Crafting Experience...

From Sep 15, 2024, 12:00 AM to Sep 20, 2024, 11:59 PM

\$10.55

Instagram Post

429 Impressions

\$10.55

Instagram post: ☐ ☐ Join Us for a Special Evening...

From Sep 15, 2024, 12:00 AM to Sep 20, 2024, 11:59 PM

\$21.75

Instagram Post

3,215 Impressions

\$21.75

Instagram post: Join Our Art Therapy Workshop:...

From Sep 15, 2024, 12:00 AM to Sep 20, 2024, 11:59 PM

\$50.60

Instagram Post

7,527 Impressions

\$50.60

Instagram post: ☐ ☐ ☐ ☐ Calling all Halloween lovers!...

From Sep 15, 2024, 12:00 AM to Sep 20, 2024, 11:59 PM

\$9.59

Instagram Post

1,087 Impressions

\$9.59

Meta Platforms, Inc.
1 Meta Way
Menlo Park, CA 94025
United States

Presson Gallery
415 S MAIN ST
moline, NC 28112
United States

Business Plan for Presson Gallery

Executive Summary:

Presson Gallery is a local art gallery located in Monroe, N.C., dedicated to promoting and showcasing the works of talented local artists. Our mission is to create a vibrant space that fosters a connection between artists and the community, providing a platform for artistic expression and appreciation.

Mission Statement:

To enrich the local art scene by curating and exhibiting diverse artworks, supporting emerging artists, and engaging the community through art events and educational programs.

Business Description:

Presson Gallery will serve as a hub for local artists to exhibit and sell their work. The gallery will feature a rotating collection of paintings, sculptures, photographs, and other visual arts. In addition to regular exhibitions, we plan to prominently feature an artist and organize workshops and community events to create a dynamic and inclusive cultural space.

Market Analysis:

Target Audience:

- Art enthusiasts and collectors.
- Residents seeking cultural experiences.
- Tourists interested in local art and culture.

Competitive Analysis:

- Identify other local galleries and assess their strengths and weaknesses.
- Differentiate Presson Gallery by focusing on supporting emerging artists and hosting community-driven events.

Products and Services:

- Rotating art exhibitions featuring diverse mediums and styles.
- Art sales and commissions.
- Workshops and educational programs.
 - Hosting events with local art-related activities.

Marketing Plan:

- Develop a strong online presence through a website and social media platforms.
- Collaborate with local businesses for cross-promotions.
- Offer opening night events with artist meet-and-greets.
- Feature an artist once a month.
- Offer promotions.

Operational Plan:

- Establish partnerships with local artists and art organizations.
 - Work closely with artists to develop an engaging exhibit.
- Hire experienced gallery staff.
- Develop an inventory management system for artwork tracking.
- Develop inventory for gallery supplies.

Financial Plan:

Startup Costs:

- Secure funding for lease, renovations, initial inventory, and marketing.

Revenue Streams:

- Art sales
- Workshops

Break-even Analysis:

- Projecting the time required to cover initial investment through revenue is difficult at this juncture as we don't yet have a full roster of artists and haven't yet finalized pricing for each artist. We have adequate financial resources to cover all operating expenses for several years, even without any sales, so we have no concern about business viability.

SWOT Analysis:

Strengths:

- Unique focus on supporting local emerging artists.
- Engaging community events and workshops.
- Local partnerships for cross-promotion.

Weaknesses:

- Dependence on the local art scene and economy.
- Initial challenges in building a customer base.

Opportunities:

- Growing interest in supporting local businesses and artists.
- Collaboration opportunities with local businesses and organizations.
- Artist recognition

Threats:

- Economic downturn impacting art sales.
- Competition from other local galleries.

Risk Management:

- Diversify revenue streams to reduce dependence on art sales alone.
- Establish a financial reserve for unforeseen challenges.
- Regularly assess and adapt marketing strategies based on performance.

Conclusion:

Presson Gallery aims to become a cultural cornerstone in Monroe, fostering creativity and

community engagement through the promotion of local art. By providing a platform for emerging artists and creating a welcoming space for art lovers, we anticipate becoming a vital part of the local cultural landscape.



CITY OF MONROE

STAFF REPORT

TO: Downtown Advisory Board

VIA: Jeff Wells, Assistant City Manager

DATE: February 19, 2024

PREPARED BY: Donna O'Keefe, Downtown Manager

SUBJECT: Downtown Economic Development Residential Incentive Grant – Gateway Development

SUMMARY STATEMENT

The Downtown Advisory Board is requested to consider and recommend to City Council a Downtown Economic Development Residential Incentive Grant to Gateway Development- Presson Building at 113/115 S. Main Street owner, James Scott Purdy.

REVIEW

The Residential Incentive Grant program (RIG) was designed to provide financial assistance to property owners and developers who wish to create upper floor residential units in the Central Business District. . This grant encourages the inhabitation of this unused space within the downtown area and serves as a catalyst to preserve structures that give downtown its uniqueness. This grant was designed to significantly reduce the costs associated with the rehabilitation of the income producing structures by providing \$20 per \$100 of the assess tax value of the property once the project is completed.

This project was completed in March 15, 2024 and has been inspected for completion. The new tax appraised value was provided on by the Union County Tax Assessor Office on January 2, 2025. The new assessed value after improvements, is \$1,112,300.

The rehabilitation of 113/115 S. Main Street was substantial and the eligible costs incurred with in the project included; Construction costs of \$1,084,320, Construction Interest of \$62,525, Architectural and Engineering fees of \$171,971 for a total of \$1,319,316. This amount is 67.43% if the total building renovation costs and meets the required 2x the amount of the grant. Based on the residential portion (3010 square feet) of the assessed value, the calculated residential grant is \$111,674.92.

RECOMMENDATION

Staff requests Downtown Advisory Board recommend the approval Residential Improvement Grant of \$111,674.92.

Attachment:
Application
Project Cost Breakdown
Invoices
Photos
2025 Property Tax Record

DRAFT



Downtown Monroe

Residential Incentive Grant

Application



Owner's Name: James Scott Purdy Date: 12 / 13 / 2024
Owner's Mailing Address: 1619 Waxhaw Indian Trail Rd S. Phone: 704 998-7198
Waxhaw, NC 28173

Building Name: Persson Building
Building Address: 113 / 115 Main Street
Building's Physical Address: 113 / 115 Main Street
Monroe, NC 28112
Project Start: 2 / 1 / 2023
Project End: 12 / 31 / 2023

Project Description: (see attached)

Project Cost: \$ 1024,320
CONTRACTOR LICENSE # 21631

Please attach the following:

- 1) Color photographs of existing conditions of proposed improvement area
- 2) Samples of paint and wall coverings and floor coverings
- 3) Description of appliances, light fixtures, etc. to be installed
- 4) Written specifications outlining scope of work
- 5) Drawings of proposed renovations
- 6) Contractors estimate and NC License Number

Tenant's Name: _____ Phone: _____
Business Name: _____

By providing this Grant Application to the City of Monroe, I hereby certify for the company that all the information provided is true and correct. I also agree to cooperate with the City of Monroe by providing such information and such access to our records as may be necessary to verify the enclosed information. I also understand that any facts found to be incorrect or false, will be grounds for termination of the incentive grant agreement.

Authorized Corporate Signature: [Signature] Date: 12 / 13 / 24
Please Print Name and Title: James Scott Purdy owner

City of Monroe—Downtown Monroe
113 West Morgan Street • Monroe, North Carolina 28112

PROJECT DESCRIPTION

The two-story 4,000 SF Presson Building will be rehabilitated to accommodate three residential apartments on the upper level with exterior balconies fronting onto Correll Street. A fine arts gallery with supporting offices will be located on the ground level. These uses will require structural modifications to the perimeter wall footings and also to interior support piers and lentels. Entrances and exits have been strategically located to meet code regulations.

Exterior improvements include a new roof system, window and storefront modifications, repairs of existing exterior stonework, tuck pointing of existing failed mortar joints.

For a more detailed description, see the following Summary of Work & architectural drawings.

Summary of Work

Repairs and alterations to an existing two-story type IIIB structure originally constructed circa 1941 with exterior mass walls constructed of built in-place composite stone masonry, concrete and brick masonry with conventional joist and rafter framing and boards for roof sheathing and subfloor for the second floor.

The first story assembly and business occupancy space will be repaired and altered with new construction with tenant up-fit requirements for an art gallery and offices. Existing walls are patched and repaired with new finishes. New ADA restrooms with new toilets and laboratories are to be provided. New fire sprinkler system will also be installed per building code.

Existing second floor construction will be completed with gypsum board ceilings installed to complete the horizontal fire separation requirement.

The first and second floor residential occupancy is to be completed as shown to obtain a certificate of occupancy and subsequently occupied as soon as construction is completed.

Facade repairs include cleaning of existing exterior stonework, tuck pointing of existing failed mortar joints including repair of structural cracking in exterior walls, patching and repair of interior surfaces of exterior walls due to water intrusion, repair and patching of reinforced concrete headers for doors and headers and sills for window openings as preparation for new construction and alterations. Alterations include new openings in the mass walls, infilling selected openings in mass walls and installation of pressure treated wood blocking for new doors and windows, modifications to floor and roof framing to accommodate new egress stair construction and interior alterations to mass walls for installation of insulation and finishes.

The work includes selective demolition requirements including removal of existing first floor granular fill, subframing and wood subflooring, removal and salvage of existing equipment, removal and re-use of existing wood joists and rafters, removal of existing wall areas for new wall openings and infilling selected existing openings. A new reinforced concrete slab with thickened slab edges is required along with altering existing concrete column footings, new concrete foundations for new interior and exterior steel columns, new steel columns and beams, miscellaneous wood and steel framing and steel fabrications, repairs and alterations to existing stone and concrete/masonry wall construction and new exterior cold form steel wall framing.

New construction includes new concrete slab, new floor and roof framing in selected areas for new openings and infill of existing openings, construction of new rated and non-rated walls and partitions, floor, wall and ceiling finishes, suspended gypsum board ceilings and mechanical and electrical systems, sun shading devices, protective cover at entry, construction of exterior second floor balconies and an enclosed stair landing/entry area cover.

1/27/2025 BT Feb 12 2:00

New County Assessed Value - 535,154
(Expansion excluded)

Construction Interest & Taxes - 92,726.17

Architectural & Engineering fees 255,036.50

Retail Store - 29308 ft 49,32
Apartment 30108 ft 50.67%
5940 99.99

Scenario #1 New Tax Value 535,154 New Tax Value
50.67% Const. Interest 49,518
50.67% Arch & Engng fees 129,227
703,899 ~~2-170,774.80~~
x .20
→ \$140,780

Scenario #2 New int'l tax on rehabilitation cost 1,608,093

x .5067
→ 814,821
49,518
129,227

50.67% 814,821
49,518
129,227
993,566

x .20
→ 198,713
993,566

Parcel# 09232067

UNION COUNTY ASSESSOR'S OFFICE
COMMERCIAL PROPERTY RECORD CARD



Parcel Act #: 09232067

Nghd #: 8291267

Site Address: 113 S MAIN ST MONROE NC 28110

Property Description: 0.079A PB02 PG128

Owner: GATEWOOD DEVELOPMENT LLC

Address: 1619 WAXHAW INDIAN TRAIL RD S WAXHAW, NC 28173

Date of Sale: 2/17/2023

Bk/Pg: 8657, 0322

Sales Price: \$0

Grantor: PURDY, JAMES SCOTT

Sales Information

Valuation Record

Tax Code: 222

Tax Status: T

Prop Class: 12-COMMERCIAL

Appr. Area: 0.0790

Legal Acres: RETAIL-ATTACHED

Grouped With:

Reason for Change: CONVERSION

Assessed Date: 02/09/2019

Assessed by: MASS

Assessed by: MASS

Assessed by: CAMA

Assessed by: CAMA

ML: 55,700

MB: 53,900

MT: 109,600

AL: 55,700

AB: 53,900

AT: 109,600

35,600

116,600

152,200

35,600

116,600

152,200

47,300

1,065,000

1,112,300

47,300

1,065,000

1,112,300

Code

7-3Vg - Com/Retail - Per Acre (by rating VG)

0.0790

598,500

0.00

0.00

0.00

0.00

0.00

0.00

0.00

0.00

0.00

0.00

1.0

5,985

\$47,280

Value

Land Valuation

Qty

Land Rate

Adj-1

Adj-2

Adj-3

Adj-4

Adj-5

Adj-6

Total Adj

Total Adj

Total Adj Rate

Value

Subtotal

\$47,280

Structure Occupancy

SecLevel

Occupancy

Section Percent

Occ. Area

Class

Rank

Eff Age

Section Stories

Bldg Stories

Bldg Mult.

Cost

Apartment (Upper rear addition)

Apartment

100.00%

55

D

3.00

10

1

1

1

\$9,671

Apartment (Upper)

Apartment

100.00%

3,010

C

3.50

10

1

1

1

\$535,154

Retail Store (Ground level)

Retail Store

100.00%

2,930

C

3.50

10

1

1

1

\$513,823

Subtotal

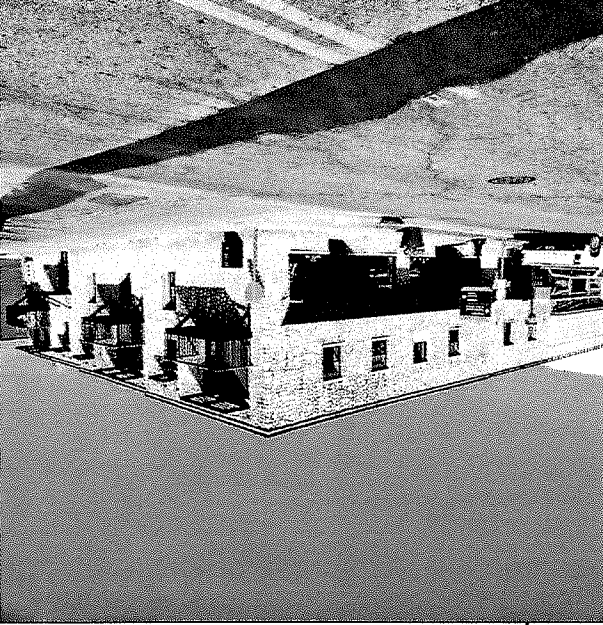
\$1,058,648

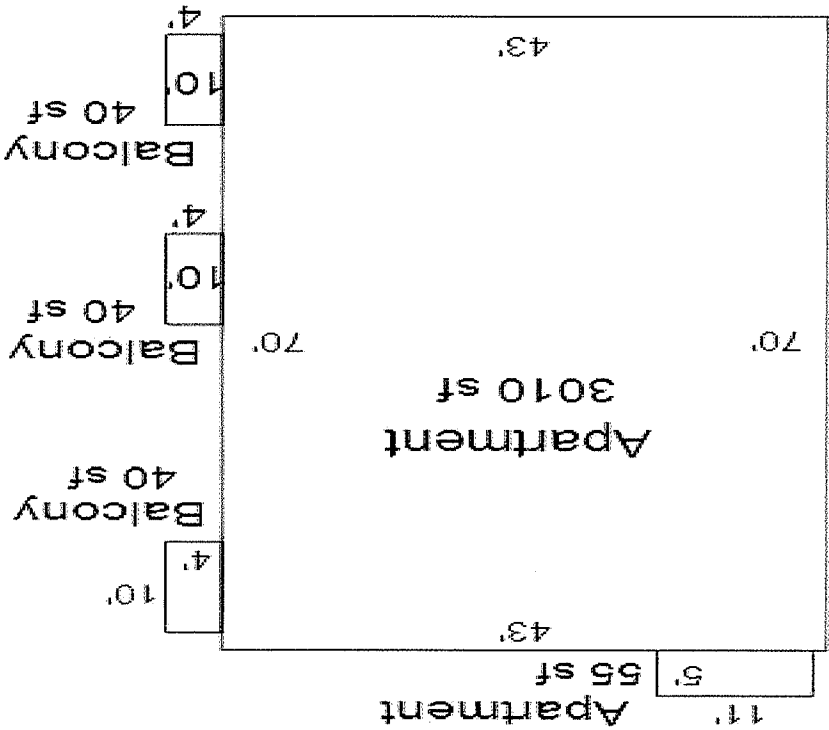
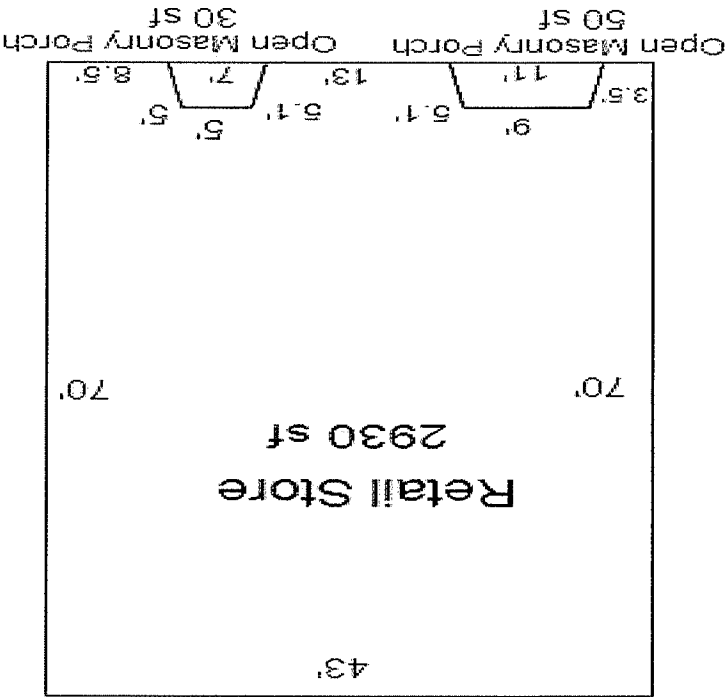
Permitting

PRINTED 1/2/2025

Information Subject to Change

2025





UNION COUNTY ASSESSOR'S OFFICE
COMMERCIAL PROPERTY RECORD CARD

PRINTED 1/2/2025



UNION COUNTY ASSESSOR'S OFFICE
COMMERCIAL PROPERTY RECORD CARD

PRINTED 1/2/2025

Card 1 of 1, Page 3

2025

[illegible]

Continuation Sheet
Project: The Rock Building

Application # 7
Application Date: 02/14/2024
Period To: 02/14/2024

Final Agreement

A	B	C	D	E	F	G	H	I
Item	Description of Work	Scheduled Value	% This Period	% To Date	From Previous Applications	This Period	To Date	Balance to Finish
201	Division 1 General Conditions	\$41,086.08	0.00%	100.00%	\$41,086.08	\$0.00	\$41,086.08	\$0.00
202	Division 2 Sitemwork	\$148,570.14	0.00%	100.00%	\$74,285.07	\$74,285.07	\$148,570.14	\$0.00
203	Division 3 Concrete	\$75,626.02	0.00%	100.00%	\$75,626.02	\$0.00	\$75,626.02	\$0.00
204	Division 4 Masonry	\$60,984.00	0.00%	100.00%	\$60,984.00	\$0.00	\$60,984.00	\$0.00
205	Division 5 Metals	\$177,149.70	0.00%	100.00%	\$177,149.70	\$0.00	\$177,149.70	\$0.00
206	Division 6 Wood & Plastics	\$135,647.19	0.00%	100.00%	\$135,647.19	\$0.00	\$135,647.19	\$0.00
207	Division 7 Thermal & Moistures	\$114,920.51	0.00%	100.00%	\$114,920.51	\$0.00	\$114,920.51	\$0.00
208	Division 8 Doors & Windows	\$90,045.90	0.00%	100.00%	\$90,045.90	\$0.00	\$90,045.90	\$0.00
209	Division 9 Finishes	\$198,097.04	0.00%	100.00%	\$198,097.04	\$0.00	\$198,097.04	\$0.00
210	Division 10 Specialties	\$26,649.00	0.00%	100.00%	\$26,649.00	\$0.00	\$26,649.00	\$0.00
211	Division 11 Equipment	\$0.00	-	0.00%	\$0.00	-	\$0.00	\$0.00
212	Division 12 Furnishing	\$17,388.00	0.00%	100.00%	\$17,388.00	\$0.00	\$17,388.00	\$0.00
213	Division 13 Special Construction	\$83,260.80	0.00%	100.00%	\$83,260.80	\$0.00	\$83,260.80	\$0.00
214	Division 14 Conveying Systems	\$0.00	-	0.00%	\$0.00	-	\$0.00	\$0.00
215	Division 15 Mechanical	\$166,606.00	0.00%	100.00%	\$166,606.00	\$0.00	\$166,606.00	\$0.00
216	Division 16 Electrical	\$209,572.02	0.00%	100.00%	\$209,572.02	\$0.00	\$209,572.02	\$0.00
Subtotal		\$1,563,602.39	4.00%	100.00%	\$1,489,317.32	\$74,285.07	\$1,563,602.39	\$0.00

Item	Change Order	Scheduled Value	% This Period	% To Date	From Previous Applications	This Period	To Date	Balance to Finish
217	1	\$23,657.56	100.00%	100.00%	\$23,657.56	\$0.00	\$23,657.56	\$0.00
217	2	\$20,833.08	100.00%	100.00%	\$20,833.08	\$0.00	\$20,833.08	\$0.00
217	3	\$0.00	0.00%	0.00%	\$0.00	\$0.00	\$0.00	\$0.00
217	4	\$0.00	0.00%	0.00%	\$0.00	\$0.00	\$0.00	\$0.00
217	5	\$0.00	0.00%	0.00%	\$0.00	\$0.00	\$0.00	\$0.00

Continuation Sheet
Project: The Rock Building

Application # 7
Application Date: 02/14/2024
Period To: 02/14/2024

Total Change Orders	\$44,490.64	0.00%	100.00%	\$44,490.64	\$1.00	\$44,490.64	\$0.00
Total	\$1,608,093.03	4.6%	100.0%	\$1,533,507.94	\$74,285.07	\$1,608,093.03	\$0.00

*Application & Certification for Payment containing contractor's signed certification is attached

State of NC
County of Union

Final Lien Waiver

Contractor's Affidavit of Payment of Debts and Final Waiver of Lien

To Customer: Mark Bennett
1619 Waxhaw Indian Trail Rd
S. Waxhaw, NC 28173

For Project: The Rock Building
113/115 Main Street
Monroe, NC 28112

From Contractor: Sonshine Construction, Inc.
12730 Vantage Point Ln.
Huntersville, N.C 28078

Payment Application # 7

Contract Date: 01/06/2023
Contracted For: renovation

Contract Amount: \$74,285.07

Period To: 02/14/2024

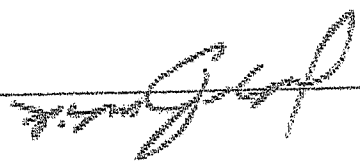
The undersigned, being first duly sworn, and is familiar with the facts herein stated, hereby certifies that, except as listed below, he will pay in full or will otherwise satisfy all obligations for all materials and equipment furnished, for all work, labor, and services performed, and for all known indebtedness and claims against the owner for damages arising in any manner in connection with the performance of the contract referenced above for which (the owner) or his property might in any way be held responsible.

Exceptions:

Upon receipt of Payment in the amount of \$0.00 the balance owed will be \$0.00

For and in consideration of the above payment, the undersigned makes this affidavit and partial waiver of lien on behalf of and waives all liens and claims against (borrower) and further, he represents that no other person or party has any right to a lien on account of any work performed or material furnished to

Contractor signature:



Red lined items = up-
 Fair Interior construction cost
 (See sheet 10/10 for Recap)

Customer Estimate Sheet

Project: The Rock Building

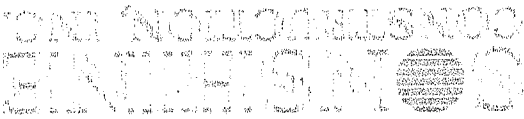
Date: 02/09/2023

Square Footage: 5980

Proposal #: 44966-11

Price per Square Foot: \$255.59

Price Total: \$1,528,448.39



Division 1 General Conditions						
Description	Qty	Unit	Total	Subcontractor	Cost per Sqft	% of Total

Contingency	1	lot	\$6,300.00	SSC	\$1.05	0.41%
Permits	1	allow	\$8,190.00	Union	\$1.37	0.54%
Temp. Utilities (Toilets & Power)	1	lot	\$378.00	SSC	\$0.06	0.02%
Porta-Jon	4	mo	\$655.20	SSC	\$0.11	0.04%
Equipment Fuel	1	lot	\$756.00	SSC	\$0.13	0.05%
Interim cleaning	5980	sf	\$2,637.18	SSC	\$0.44	0.17%
Final cleaning	5,980	sf	\$1,883.70	SSC	\$0.32	0.12%
Plan reproductions	1	lot	\$567.00	SSC	\$0.09	0.04%
Trash removal (dumpsters)	9	allow	\$6,237.00	Northstate Waste	\$1.04	0.41%
Furnish scissor lift interior	4	wks	\$2,268.00	Nett	\$0.38	0.15%
Furnish Lull	3	wk	\$5,292.00	Nett	\$0.88	0.35%
Furnish Mini-Ex	2	wk	\$2,268.00	Nett	\$0.38	0.15%
Furnish Skidsteer	2	wk	\$1,638.00	Nett	\$0.27	0.11%
Equipment delivery	2	lot	\$1,260.00	Nett	\$0.21	0.08%

Division 2 Siterwork						
Description	Qty	Unit	Total	Subcontractor	Cost per Sqft	% of Total

Complete Siterwork per drawings	1	lot	\$148,570.14		\$24.84	9.72%
Division 3 Concrete						
Description	Qty	Unit	Total	Subcontractor	Cost per Sqft	% of Total
Existing Flooring/Beams @ 1st floor future slab	2870	sf	\$7,232.40	SSC	\$1.21	0.47%
F&I Gravel Subgrade	2870	sf	\$12,656.70	SSC	\$2.12	0.83%
Division 3 Concrete						
						\$75,628.02

28,334

28,334

1/10

Customer Estimate Sheet

Project: The Rock Building
 Date: 02/09/2023
 Proposal #: 44966-11
 Square Footage: 5980
 Price Total: \$1,528,448.39
 Price per Square Foot: \$255.59



F&I Exterior Rear Slab @ Rear Stair	60	sf	\$2,041.20	SSC	\$0.34	0.13%
F&I Concrete @ Stair Landings	80	sf	\$1,713.60	SSC	\$0.29	0.11%
Footing Prep	23	yds	\$3,622.50	SSC	\$0.61	0.24%
Furnish Slab Concrete	36	yds	\$15,876.00	SSC	\$2.65	1.04%
Furnish Footing Concrete	23	yds	\$10,143.00	SSC	\$1.70	0.66%
F&I Concrete Labor-Footings	23	yds	\$5,796.00	SSC	\$0.97	0.38%
F&I Slab Prep	2911	sf	\$6,051.97	SSC	\$1.01	0.40%
F&I Concrete Labor-slab	2911	sf	\$9,169.65	SSC	\$1.53	0.60%
Furnish Concrete Pump	1	lot	\$819.00	SSC	\$0.14	0.05%
Concrete Cutting	1	lot	\$504.00	SSC	\$0.08	0.03%

2,923

Division 4 Masonry						
Description	Qty	Unit	Total	Subcontractor	Cost per Sqft	% of Total
F&I Front Wall Repair @ new storefront	1	lot/allow	\$3,150.00	Juan	\$0.53	0.21%
F&I Misc Masonry Beam Repair Allowance	1	lot/allow	\$3,150.00	Juan	\$0.53	0.21%
F&I Misc Masonry Wall Cuts	1	lot/allow	\$15,750.00	Juan	\$2.63	1.03%
F&I Cast Stone Wall Cap @ new storefront	55	lf	\$10,395.00	Juan	\$1.74	0.68%
F&I Masonry Infill @ windows	1	lot/allow	\$11,214.00	Juan	\$1.88	0.73%
F&I Concrete Cast Headers	50	lf	\$7,875.00	Juan	\$1.32	0.52%
\$66,984.00						
3.99%						

34,839

Division 5 Metals						
Description	Qty	Unit	Total	Subcontractor	Cost per Sqft	% of Total
Steel Erection	1	lot	\$40,950.00	SSC	\$6.85	2.68%
Misc Steel Components Allowance	1	lot	\$3,150.00	New Age	\$0.53	0.21%
F&I Balcony Steel Structures	3	ea	\$14,718.00	New Age	\$1.96	0.77%
X2X 5/16" Plates @ 2nd floor balcony openings	3	ea	\$5,670.00	New Age	\$0.95	0.37%
F&I Misc Shoring	1	allow	\$8,190.00	New Age	\$1.37	0.54%
\$177,148.70						
11.59%						

266.6

49,770
 92,532

2/17

2/10

8774
92,542

Description	Qty	Unit	Total	Subcontractor	Cost per Sqft	% of Total
Demo Existing Storefront Enclosure	1	lot	\$1,890.00 SSC		\$0.32	0.12%
First Floor Wall Framing Labor	167	lf	\$11,573.10 SSC		\$1.94	0.76%
Blocking Labor @ all existing column line joist	200	lf	\$5,040.00 SSC		\$0.84	0.33%
First Floor Wall Framing Material	167	lf	\$5,681.34 SSC		\$0.95	0.37%
Furnish 1-3/4" x 7.5" LVL Blocking Material	200	lf	\$1,638.00 SSC		\$0.27	0.11%
Framing Labor for new RTU cutout areas	3	ea/allow	\$8,804.00 SSC		\$1.14	0.45%
Furnish Misc Material @ RTU cutout areas	3	ea/allow	\$945.00 SSC		\$0.16	0.06%
Install New 10" Floor Joists	30	ea	\$1,223.00 SSC		\$0.22	0.09%
new 6" Ceiling Joists @ all new 10" Floor Joists	30	ea	\$1,134.00 SSC		\$0.19	0.07%
Furnish 2x10x12' Joists	30	ea	\$945.00 SSC		\$0.16	0.06%
Install H10A & A2.5 Rafter Clips	125	ea	\$945.00 SSC		\$0.16	0.06%

\$135,647.19	8.87%
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73,798

F&I Concrete Tread Stairs & Railing	1	lot	\$34,650.00 New Age		\$5.79	2.27%
F&I Balcony Railing	1	lot	\$12,222.00 New Age		\$2.04	0.80%
F&I New Front TS 6x3x1/4" Columns	5	ea	\$9,765.00 New Age		\$1.63	0.64%
F&I New TS 6x8x1/4" Columns	4	ea	\$12,600.00 New Age		\$2.11	0.82%
F&I New TS 4x3x1/4"	2	ea	\$2,394.00 New Age		\$0.40	0.16%
16"x 40" Continuous Bent Plate @ front header	39	lf	\$14,742.00 New Age		\$2.47	0.96%
F&I 15" x 3/4" Plate @ openings @ storefront	39	lf	\$3,685.50 New Age		\$0.62	0.24%
F&I TS 12"x2"x5/16" Header Plates	16	lf	\$3,024.00 New Age		\$0.51	0.20%
F&I New TS 4x4x1/4"	3	ea	\$1,096.20 New Age		\$0.18	0.07%
Modify existing Beaming Beam @ new stair	1	lot	\$1,071.00 New Age		\$0.18	0.07%
1/2" Bent plate @ New Rear opening Column	2	ea	\$2,142.00 New Age		\$0.36	0.14%
1/2" x 5/16" bent plate @ 2nd floor rear openings	2	ea	\$10,080.00 New Age		\$1.69	0.66%

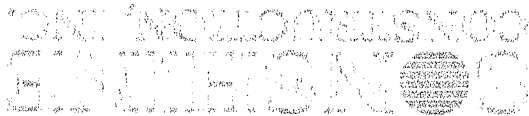
Price Total: \$1,528,448.39
 Price per Square Foot: \$255.59
 Proposal #: 44966-11
 Square Footage: 5980
 Date: 02/09/2023

Customer Estimate Sheet

Customer Estimate Sheet

Project: The Rock Building
Date: 02/09/2023
Square Footage: 5980
Price Total: \$1,528,448.39
Price per Square Foot: \$255.59

Proposal #: 44966-11



30	ea	\$869.40	SSC	\$0.15	0.06%
2	ea	\$3,780.00	SSC	\$0.63	0.25%
20	ea	\$1,335.60	SSC	\$0.22	0.09%
48	ea	\$514.08	SSC	\$0.09	0.03%
8	shits	\$655.20	SSC	\$0.11	0.04%
8	shits	\$756.00	SSC	\$0.13	0.05%
360	ea	\$3,175.20	SSC	\$0.53	0.21%
360	ea	\$1,134.00	SSC	\$0.19	0.07%
70	sf	\$3,087.00	SSC	\$0.52	0.20%
70	sf	\$2,646.00	SSC	\$0.44	0.17%
3	ea	\$1,323.00	SSC	\$0.22	0.09%
265	sf	\$2,170.35	SSC	\$0.36	0.14%
1	lot	\$6,300.00	SSC	\$1.05	0.41%
173	lf	\$3,269.70	SSC	\$0.55	0.21%
53	lf	\$1,202.04	SSC	\$0.20	0.08%
226	lf	\$5,125.68	SSC	\$0.86	0.34%
5	ea/allow	\$1,732.50	SSC	\$0.29	0.11%
5	ea/allow	\$756.00	SSC	\$0.13	0.05%
19	lf/allow	\$837.90	SSC	\$0.14	0.05%
F&I Wood Handrail Cap @ stair 2nd floor					

2/8/219

Division 7 Thermal & Moistures					
Description					
Qty	Unit	Total	Subcontractor	Cost per Sqft	% of Total
1520	sf	\$3,830.40		\$0.64	0.25%
40	shits	\$3,780.00		\$0.63	0.25%
583	sf	\$1,101.87	SSC	\$0.18	0.07%
F&I Interior Partition R-19 Insulation 6" walls					
Install PolyStyrene Shits					
Install 2.5" Mineral Wool Batts					

3,711

36,930

4/10

Customer Estimate Sheet

Project: The Rock Building

Date: 02/09/2023

Proposal #: 44966-11

Square Footage: 5980

Price per Square Foot: \$255.59

Price Total: \$1,528,448.39



F&I Ceiling Insulation	2911	sf	\$10,086.62	SSC	\$1.69	0.66%
terior Partition R-13 Insulation 4" walls-1st floor	1908	sf	\$3,005.10	SSC	\$0.50	0.20%
F&I Mineral Wool Floor Insulation	2911	sf	\$11,003.58	SSC	\$1.84	0.72%
or Wall Insulation @ New Rear Stair Enclosure	264	sf	\$498.96	SSC	\$0.08	0.03%
Furnish 2" Polystyrene Board @ Exterior Walls	40	shts	\$4,284.00	SSC	\$0.72	0.28%
Furnish 2.5" Mineral Wool Batts	1520	sf	\$5,745.60	SSC	\$0.96	0.38%
F&I New EPDM Roof	1	lot	\$44,100.00	CDS	\$7.37	2.89%
F&I Drip Flashing @ Front Masonry	40	lf	\$1,764.00	SSC	\$0.29	0.12%
F&I Drip Flashing @ Window Headers	91	lf	\$4,013.10	SSC	\$0.67	0.26%
F&I Gutters & Downs	1	lot	\$1,890.00		\$0.32	0.12%
F&I R-30 Ceiling Insulation Batts in roof trusses	2911	sf	\$11,003.58		\$1.84	0.72%
terior Partition R-13 Insulation 4" walls-2nd floor	1540	sf	\$3,880.80		\$0.65	0.25%
tion Mineral Wool in Demising Walls-2nd floor	870	sf	\$4,932.90		\$0.82	0.32%

45,687

Division 8: Doors & Windows						
Description	Qty	Unit	Total	Subcontractor	Cost per Sqft	% of Total
Install New Windows	10	ea	\$1,575.00		\$0.26	0.10%
Furnish New Windows	10	ea/allow	\$6,300.00		\$1.05	0.41%
Install HM Framed Doors	4	ea	\$630.00	SSC	\$0.11	0.04%
Furnish Exterior Storage Door hardware	1	ea	\$113.40	Burgess	\$0.02	0.01%
ish Exterior 6/0x6/8 Exterior Metal Door/Frame	1	ea	\$630.00	Burgess	\$0.11	0.04%
Furnish Interior HC Doors	3	ea	\$661.50	Burgess	\$0.11	0.04%
Furnish Interior HM Frames	3	ea	\$567.00	Burgess	\$0.09	0.04%
Furnish Interior Door Hardware	3	ea	\$623.70	Burgess	\$0.10	0.04%
F&I Front Storefront Window	468	sf	\$32,432.40	G&M	\$5.42	2.12%
F&I Rear Stair Enclosure Storefront Window	27	sf	\$1,871.10	Burgess	\$0.31	0.12%
F&I Storefront Door D100C & D002	1	lot	\$5,292.00	G&M	\$0.88	0.35%

5,639
60,726

5/10

Customer Estimate Sheet

Project: The Rock Building
 Date: 02/09/2023
 Proposal #: 44966-11
 Square Footage: 5980
 Price Total: \$1,528,448.39
 Price per Square Foot: \$255.59



20 min Apartment Entry Door- Smooth 3/0x7/0	ea	3	\$1,323.00	84	\$0.22	0.09%
nish Apartment Entry Door Locksets/Deadbolts	ea	3	\$378.00	84	\$0.06	0.02%
Furnish Interior Apartment Bifold Doors	ea	7	\$1,543.50	84	\$0.26	0.10%
Furnish Interior Apartment Double Doors	ea	3	\$1,806.50	84	\$0.27	0.11%
Furnish Interior Apartment 2 Panel Doors	ea	7	\$2,425.50	84	\$0.41	0.16%
sh Balcony Doors 6/0x8/0 w/ 1/6x8/0 sidelights	ea	3	\$20,790.00	84	\$3.48	1.36%
Furnish Interior Door Hardware	ea	10	\$630.00	84	\$0.11	0.04%
Furnish Balcony Door Hardware	ea	3	\$472.50	84	\$0.08	0.03%
Install Balcony Doors	ea	3	\$945.00 SSC		\$0.16	0.06%
Install Interior Doors	ea	20	\$3,150.00 SSC		\$0.53	0.21%

27,059

Division & Finishes		Qty	Unit	Total	Subcontractor	Cost per Sqft	% of Total
							12.83%
							\$185,097.04

Install 2nd Floor Wall Drywall	shits	130		\$9,724.00 SSC		\$1.63	0.64%
Install Wall Drywall-1st floor	shits	120		\$8,976.00 SSC		\$1.50	0.59%
Install Ceiling Drywall	shits	228		\$18,604.80 SSC		\$3.11	1.22%
Resilient Hat Channel @ 1st & 2nd floor ceiling	ea	430		\$4,093.60 SSC		\$0.68	0.27%
Furnish 7/8" Hat Channel	ea	430		\$2,631.60 CK Supply		\$0.44	0.17%
Furnish Drywall Accessories	lot	1		\$1,632.00 CK Supply		\$0.27	0.11%
Furnish Drywall	shits	478		\$11,701.44 CK Supply		\$1.96	0.77%
mic Tile DuraRock Prep @ kitchen & bathrooms	sf	440		\$2,842.40 SSC		\$0.48	0.19%
Install Kitchen/Bathroom Floor Tile	sf	440		\$4,188.80 SSC		\$0.70	0.27%
Install Subway Tile Kitchen Backsplashes	sf	136		\$1,479.68 SSC		\$0.25	0.10%
e Subway Tile Backsplash material @ kitchens	sf	136		\$554.88 SSC		\$0.09	0.04%
Furnish Tile Accessories	lot	1		\$884.00 SSC		\$0.15	0.06%
Furnish Kitchen/Bathroom Floor Tile	sf/allow	440		\$2,992.00 SSC		\$0.50	0.20%
Install New Wood Floor throughout	sf	2700		\$31,212.00 SSC		\$5.22	2.04%

27,536

273,595

6/10

Customer Estimate Sheet

Project: The Rock Building

Date: 02/09/2023

Square Footage: 5980

Proposal #: 44966-11

Price per Square Foot: \$255.59

Price Total: \$1,528,448.39



2700	sf	\$5,508.00	SSC	\$0.92	0.36%
2700	sf/allow	\$16,524.00	SSC	\$2.76	1.08%
455	lf	\$1,237.60	SSC	\$0.21	0.08%
2870	sf	\$4,879.00	SSC	\$0.82	0.32%
2870	sf	\$4,879.00	SSC	\$0.82	0.32%
2870	sf	\$750.72	SSC	\$0.13	0.05%
5236	sf	\$8,901.20	SSC	\$1.49	0.58%
4	ea	\$816.00	SSC	\$0.14	0.05%
1	lot	\$3,400.00	SSC	\$0.57	0.22%
3	ea	\$1,020.00	SSC	\$0.17	0.07%
20	ea	\$2,720.00	SSC	\$0.45	0.18%
4600	sf	\$7,820.00		\$1.31	0.51%
460	lf	\$938.40		\$0.16	0.06%
1848	sf	\$35,185.92		\$5.88	2.30%

1/8,355

0116

Division 10 Specialties					
Description	Qty	Unit	Total	Subcontractor	Cost per Sqft
% of Total					1.74%

2	ea	\$378.00	SSC	\$0.06	0.02%
1	lot	\$378.00	SSC	\$0.06	0.02%
4	ea/allow	\$1,008.00	SSC	\$0.17	0.07%
10	ea/allow	\$2,079.00	SSC	\$0.35	0.14%
2	ea	\$1,260.00	SSC	\$0.21	0.08%
3	ea/allow	\$1,890.00		\$0.32	0.12%
1	allow	\$19,656.00	Vendor	\$3.29	1.29%

24,633

67,988

7/10

Customer Estimate Sheet

Project: The Rock Building Date: 02/09/2023

Proposal #: 44966-11 Square Footage: 5980

Price per Square Foot: \$255.59

Price Total: \$1,528,448.39



Division 12 - Finishing							
Description	Qty	Unit	Total	Subcontractor	Cost per Sqft	% of Total	
F&I Appliances	3	units/allow	\$17,388.00		\$2.91		#DIV/0!
Division 13 - Special Construction							
Detection & Alarms	1	allow	\$19,000.80	Wayne	\$3.18	1.24%	
Fire Suppression	1	allow	\$64,260.00	Wayne	\$10.75	4.20%	
Division 14 - Conveying Systems							
Description	Qty	Unit	Total	Subcontractor	Cost per Sqft	% of Total	
							\$0.00 0.00%
Division 15 - Mechanical							
Description	Qty	Unit	Total	Subcontractor	Cost per Sqft	% of Total	
Plumbing	1	allow	\$22,680.00	Signature	\$3.79	1.48%	
Furnish Plumbing Fixtures-Apartments	3	ea/allow	\$18,900.00		\$3.16	1.24%	
Apartment HVAC	3	allow	\$47,628.00	TCS	\$7.96	3.12%	
Apartment Plumbing	3	allow	\$27,216.00	TCS	\$4.55	1.78%	
Retail HVAC	1	allow	\$35,028.00	TCS	\$5.86	2.29%	
Division 16 - Electrical							
Description	Qty	Unit	Total	Subcontractor	Cost per Sqft	% of Total	
Electrical Wiring	1	lot	\$176,308.02	Just Electric	\$29.48	11.54%	
Furnish Apartment Lighting	3	allow	\$6,804.00	Just Electric	\$1.14	0.45%	
Corridor/Stairway/Bathroom Lighting Fixtures	1	allow	\$3,150.00	Just Electric	\$0.53	0.21%	
Division 16 - Electrical							
							\$209,572.02 13.71%

86,262
403,333

116,424

43,260

7,388

3/10



Customer Estimate Sheet

Project: The Rock Building Date: 02/09/2023

Proposal #: 44966-11

Square Footage: 5980

Price Total: \$1,528,448.39
Price per Square Foot: \$255.59

Low Voltage

lot

\$3,528.00 Jose

\$0.59 0.23%

Lighting Allowance (plans say TBD by owner)

1

lot

\$19,782.00

\$3.31 1.29%

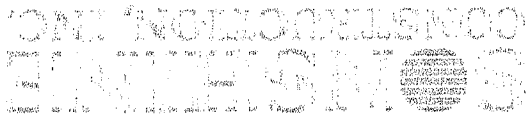
TOTAL ESTIMATE AMOUNT

\$1,528,448.39

\$255.59 per sq ft

Qualifications

- 1
- 2 from this scope pricing as we see this as unnecessary added expense
- 3 New EPDM roof included in this scope.
- Plans call for existing Hardwood flooring to be taken up and reused. Wood floor is too damaged to reuse on floors. Will be used on walls /ceiling in other rooms. Owner TBD
- 4 First Floor to be delivered w/ drywall ceilings, drywall demising wall, restrooms & concrete floor
- 5 All Stairway corridors & Storage closets not associated w/ apartments to be framed & drywall
- 6 Upstairs to be delivered with corridor/stairway walls framed & drywall, resilient channel on ceiling but no drywall
- 7 New Windows included
- 8 Apartments included in this quote. Identified in red.
- 9 Inside of 1st Floor exterior walls to be scraped of old paint & new 1" plaster topcoat applied
- 10 Corridor walls/ Stairway/Restroom walls to receive 4" rubber base
- 12 All Walls to be painted



Customer Estimate Sheet

Project: The Rock Building Date: 02/09/2023 Price Total: \$1,528,448.39
Proposal #: 44966-11 Square Footage: 5980 Price per Square Foot: \$255.59

13	included instead
14	HVAC included for both retail area & apartments
15	Temporary
16	Plumbing price includes (2) complete restroom w/ standard fixtures, Hi/Low Water Cooler only.
17	Plans call for wood railing on balconies. This has been replaced with aluminum
18	
19	4" Water tap fee not in this scope.
20	Plans call for drop ceilings in portions of the upstairs apartments. I have changed this to drywall ceilings @ same height throughout.
21	Plans call for ALL walls & ceilings to get mineral wool insulation. I have changed this to mineral wool insulation in the 2nd floor exterior walls & apartment demising walls only. Batt insulation everywhere else.
22	Apartment Kitchen & Bathrooms to receive ceramic tile floors

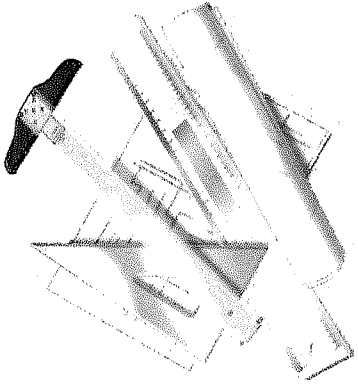
Summary: Red lined items contribute to the residual in total of the total hard construction cost in the amount of \$1,084,320 or 67.43% of the total hard construction cost of \$1,608,093

Construction Interest: $\$92,726 \times 6.743\% = \$62,525$
Architectural & Engineering Fee: $\$255,036 \times 6.743\% = \$171,971$

\$234,496
1,084,820

Total Interior Construction cost \$1,319,316

10/10



December 7, 2020

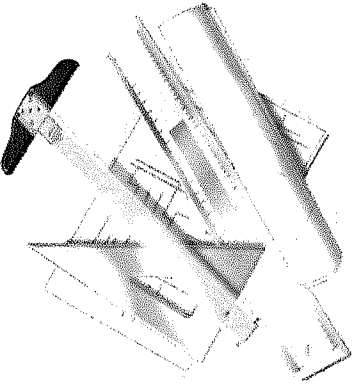
To:

John W. Thompson, Architect, P.A.
Post Office Box 1927
Belville, North Carolina 28451

From:

Paul Purvis
1053 Echo Dr. N.E.
Leland, NC 28451
910-231-8657

Rock Building on site measurements +travel time 6 hrs. @\$35 = \$210.00
This brings us current for these drawings.



December 7, 2020

To:

John W. Thompson, Architect, P.A.
Post Office Box 1927
Belville, North Carolina 28451

From:

Paul Purvis
1033 Echo Dr. N.E.
Leland, NC 28451
910-231-8657

Rock Building 5 hrs. @ \$35 = \$175.00

This brings us current for these drawings.

John W.
Thompson
Architect,
P.A.

*Architectural Fees
& Services*

DATE: 13 April 2020

INVOICE NO.: 2014

PROJECT NO.: 322006

INVOICE FOR ARCHITECTURAL SERVICES

PROJECT:

TO:

Rock Building Alterations and Repairs
113/115 South Main Street
Monroe, N.C. 28112

Mr. Charlie Griffin
Unionville, North Carolina 28110

There is due at this time for services and reimbursable expenses on the above Project for the period beginning 19 April 2019 and ending 12 April 2020, the sum of twelve thousand seven hundred fifty-seven and 50/100 dollars (\$12,757.50).

Services: Services through Schematic Design
Fee: Hourly (\$90.00/hr.)

Time Sheet Summary:

18 April 2019 through 17 January 2020:
26 February 2020 through April 12, 2020:
Total Fee earned: 141.75 hrs. x 90.00/hr.

98.75 hours
43.00 hours
\$12,757.50

Previous Payment:

<\$00.00>

Balance Fee Earned:

\$12,757.50

Fee Due:

\$12,757.50

Reimbursements: Engineering, Plots, prints

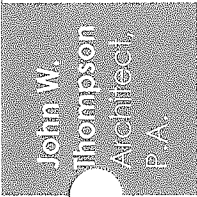
00.00

Total Due:

\$12,757.50

Statement prepared by: J. Thompson

Thank you for your prompt payment.



DATE: 08 December 2020

INVOICE NO.: 2028
PROJECT NO.: 322006

INVOICE FOR ARCHITECTURAL SERVICES

PROJECT:

TO:

Rock Building Alterations and Repairs
113/115 South Main Street
Monroe, N.C. 28112

Mr. Charlie Griffin
Unionville, North Carolina 28110

There is due at this time for services and reimbursable expenses on the above Project for the period beginning 07 May 2020 and ending 07 October 2020, the sum of sixteen thousand three hundred ninety-seven and 50/100 dollars (\$16,397.50).

Services: Services through Schematic Design
Fee: Hourly (\$90.00/hr.)

Time Sheet Summary:

07 May 2020 through 07 October 2020:

Total Fee earned: 139.25 hrs. x 90.00/hr.

Fee Earned:

Reimbursements: Engineering, measured drawings
(see attached):

Total Due:

139.25 hours

\$12,532.50

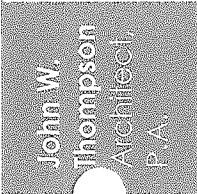
\$12,532.50

3,865.00

\$16,397.50

Statement prepared by: J. Thompson

Thank you for your prompt payment.



DATE: 26 April 2021

INVOICE NO.: 2035
PROJECT NO.: 322006

INVOICE FOR ARCHITECTURAL SERVICES

PROJECT:

Rock Building Alterations and Repairs
113/115 South Main Street
Monroe, N.C. 28112

TO:

Mr. Charlie Griffin
Unionville, North Carolina 28110

There is due at this time for services including structural drafting and paid reimbursable expenses on the above Project for the period beginning 08 October 2020 and ending 26 April 2021, the sum of twenty-seven thousand nine hundred ninety-two and 50/100 dollars (\$27,992.50).

Services: Services through 85% Construction Documents/Structural Design
Fee: Hourly (\$90.00/hr.)

Time Sheet Summary:

13 October 2020 through 19 March 2021:
Total Fee earned: 190.00 hrs. x 90.00/hr.

190.00 hours
\$17,100.00

Structural Framing/Detailing/Coordination
24 March 2021 through 26 April 2021:

Total Fee earned: 95.25 hrs. x 90.00/hr.

95.25 hours
\$8,572.50

TOTAL FEE EARNED:

\$25,672.50

REIMBURSEMENTS: Structural Engineering
(see attached paid invoice):

\$2,320.00

TOTAL DUE:

\$27,992.50

Statement prepared by: J. Thompson
Thank you for your payment.

Please make check payable to:
John W. Thompson, Architect, P.A.

Address:
10214 North Olde Towne Wynd SE
Belville, N.C. 28451



DATE: 19 July 2021

INVOICE NO.: 2037
PROJECT NO.: 322006

INVOICE FOR ARCHITECTURAL SERVICES

PROJECT:

Rock Building Alterations and Repairs
113/115 South Main Street
Monroe, N.C. 28112

TO:

Mr. Charlie Griffin
Unionville, North Carolina 28110

There is due at this time for services and paid reimbursable expenses on the above Project for the period beginning 27 April 2021 and ending 25 June 2021, the sum of thirty-four thousand two hundred five and 00/100 dollars (\$34,205.00).

Services: Services through Construction Documents
Fee: Hourly (\$90.00/hr.)

Time Sheet Summary:

27 April 2021 through 25 June 2021:

Total Fee earned 287.50 hrs. x 90.00/hr.

287.50 hours

\$25,875.00

Total Fee Earned this period:

\$25,875.00

Reimbursements: MEP Engineering
(See attached paid invoice.):

\$8,330.00

Total Fee and Reimbursement Due:

\$34,205.00

**Total Fees to Date: (Does not include original
Project fee of \$12,757.50.)
Estimated Percentage of Construction Cost:**

\$78,594.50

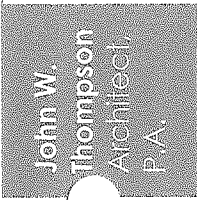
8.7%

Statement prepared by: J. Thompson
Thank you for your payment.

Please make check payable to:
John W. Thompson, Architect, P.A.

Address:

10214 North Olde Towne Wynd SE
Belville, N.C. 28451



DATE: 19 July 2021

INVOICE NO.: 2037
PROJECT NO.: 322006

INVOICE FOR ARCHITECTURAL SERVICES

PROJECT:

Rock Building Alterations and Repairs
113/115 South Main Street
Monroe, N.C. 28112

TO:

Mr. Charlie Griffin
Unionville, North Carolina 28110

There is due at this time for services and paid reimbursable expenses on the above Project for the period beginning 27 April 2021 and ending 25 June 2021, the sum of thirty-six thousand three hundred eighty-seven and 50/100 dollars (\$36,387.50).

Services: Services through Construction Documents
Fee: Hourly (\$90.00/hr.)

Time Sheet Summary:
27 April 2021 through 25 June 2021:
Total Fee earned: 311.75 hrs. x 90.00/hr.

311.75 hours
\$28,057.50

Total Fee Earned this period:

\$28,057.50

Reimbursements: MEP Engineering
(see attached paid invoice):

\$8,330.00

Total Fee and Reimbursement Due:

\$36,387.50

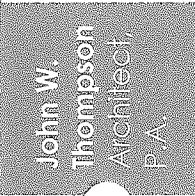
**Total Fees to Date: (Does not include original
Project fee of \$12,757.50)
Estimated Percentage of Construction Cost:**

**(\$80,777.00)
8.9%**

Statement prepared by: J. Thompson
Thank you for your payment.

Please make check payable to:
John W. Thompson, Architect, P.A.

Address:
10214 North Olde Towne Wynd SE
Belville, N.C. 28451



DATE: 23 May 2022

INVOICE NO.: 2052

PROJECT NO.: 342203

INVOICE FOR ARCHITECTURAL SERVICES

PROJECT:

Presson Building Alterations and Repairs
113/115 South Main Street
Monroe, N.C. 28112

TO:

Mr. James Scott Purdy
Gatewood Development LLC
1619 Waxhaw Indian Trail
Road S.
Waxhaw, N.C. 28173

There is due currently for design and construction document services on the above Project for the period beginning 10 March 2022 and ending 13 May 2022, the sum of six thousand four hundred fifty and 00/100 dollars (\$6,450.00).

Services: Design and Construction Documents-Plan and document revisions
Fee: Hourly (\$120.00/hr.)

Time Sheet Summary:

10 March 2022 through 13 May 2022:

53.75 hours

Total Fee earned to date: 53.75 hrs. x 120.00/hour

\$6,450.00

Total Fee Earned this period:

\$6,450.00

Reimbursements:

\$00.00

Total Fee and Reimbursement Due:

\$6,450.00

Statement prepared by: J. Thompson
Thank you for your payment.

Please make check payable to:

John W. Thompson, Architect, P.A.

Mailing Address:
10214 North Olde Towne Wynd SE
Belville, N.C. 28451

**John W.
Thompson**
Architect,
P.A.

DATE: 20 July 2022

INVOICE NO.: 2055

PROJECT NO.: 342203

INVOICE FOR ARCHITECTURAL SERVICES

PROJECT:

TO:

Presson Building Renovations, Alterations
and Repairs

Mr. James Scott Purdy
Gatewood Development LLC
1619 Waxhaw Indian Trail
Road S.
Waxhaw, N.C. 28173

113/115 South Main Street
Monroe, N.C. 28112

There is due currently for construction document services on the above Project for the period beginning 24 May 2022 and ending 15 July 2022, the sum of eight thousand one hundred sixty and 00/100 dollars (\$8,160.00).

Services: Construction Documents-Plan and document revisions

Fee: Hourly (\$120.00/hr.)

Time Sheet Summary:

24 May 2022 through 15 July 2022:	68.00 hours
24 May: Toilet layout and Appendix B, Window W01 change-	3.0 hrs.
25 May: Revise Door Schedule-add new doors, revise layout sheets for doors and windows-	4.25 hrs.
26 May: Window schedule, add office window, revise window types storefront doorway framing-	5.5 hrs.
27 May: Window notes, adjust sills, Balcony decking change, lavatory changes for vanities-	6.0 hrs.
28 May: Vanity revisions, flooring changes, storefront framing-	3.75 hrs.
31 May: Entry Walls, framing openings, review and modify building sections, adjust wall heights first floor, label new rooms and spaces, roof plan, ridge light and coping changes-	7.75 hrs.
1 June: Building sections. elevations and plan adjustments, delete ridge light, adjust wall types, publish progress set and .dwg files for MEP coordination-	9.5 hrs.
16 June: Vanity design, update drawings-	2.75 hrs.
27 June: Modify specifications to match revisions-	1.75 hrs.
28 June: Modify specifications to match revisions-	5.0 hrs.
12 July: Review MEP drawings, comments-	1.75 hrs.
13 July: Review layout sheets, update, add notes and dimensions to drawings as needed-	3.5 hrs.
14 July: Review plans and sections, break area design drawings, organize revisions and markers-	5.75 hrs.
15 July: Identify revisions, annotations, update rendering, structural revisions, publish and post final sets-	7.75 hrs.

Total Fee Earned this period: 68.00 hrs. x 120.00/hour

\$8,160.00

Invoice Con't'd.

Reimbursements:	\$00.00
Total Fee and Reimbursement Due:	\$8,160.00

Statement prepared by: J. Thompson
Thank you for your payment.

Please make check payable to:

John W. Thompson, Architect, P.A.

Mailing Address:
10214 North Olde Towne Wynd SE
Belville, N.C. 28451

Invoice

2246 Yaupon Drive
Wilmington, NC 28401
(910) 791-4000
fax (910) 791-5266



June 7, 2021
Invoice No: 20183 - 1

Mr. John Thompson
John Thompson Architect, PA
PO BOX 1927
Leland, NC 28451

Project 20183 The Rock
Professional Services for the Period: April 26, 2021 to May 25, 2021
Billing Group 01 Initial Contract
Fee

Phase	Phase Fee	Percent Complete	Fee Earned	Prior Billing	Current Billing
Construction Documents	9,800.00	85.00	8,330.00	0.00	8,330.00
Total Fee	9,800.00		8,330.00	0.00	8,330.00
Total Fee for Billing Group					8,330.00
					\$8,330.00
Total Current Invoice Amount					\$8,330.00

Billings to Date	Current	Prior	Total	Received	A/R Balance
	8,330.00	0.00	8,330.00	0.00	8,330.00

This invoice is payable upon receipt. After 30 days, a finance charge, computed at the rate of 1.5% per month, or an annual percentage rate of 18% will be applied to the outstanding invoices.

Paid 071221
Check No.
1543

Invoice

CBHF
Engineers, PLLC

2246 Yaupon Drive
Wilmington, NC 28401
(910) 791-4000
fax (910) 791-5266

August 6, 2021
Invoice No: 20183 - 2

Mr. John Thompson
John Thompson Architect, PA
PO BOX 1927
Leland, NC 28451

Project 20183 The Rock
Professional Services for the Period: June 26, 2021 to July 25, 2021

Billing Group 01 Initial Contract
Fee

Phase	Phase Fee	Percent Complete	Fee Earned	Prior Billing	Current Billing
Construction Documents	9,800.00	100.00	9,800.00	8,330.00	1,470.00
Total Fee	9,800.00		9,800.00	8,330.00	1,470.00
Total Fee for Billing Group					1,470.00
					\$1,470.00
Total Current Invoice Amount					\$1,470.00

Billings to Date	Current	Prior	Total	Received	A/R Balance
	1,470.00	8,330.00	9,800.00	8,330.00	1,470.00

This invoice is payable upon receipt. After 30 days, a finance charge, computed at the rate of 1.5% per month, or an annual percentage rate of 18% will be applied to the outstanding invoices.

Invoice

2246 Yaupon Drive
Wilmington, NC 28401
(910) 791-4000
fax (910) 791-5266

August 8, 2022
Invoice No: 20183 - 3

Mr. John Thompson
John Thompson Architect, PA
PO BOX 1927
Leland, NC 28451

Project 20183 The Rock
Professional Services for the Period: June 26, 2022 to July 25, 2022
Billing Group 01 Initial Contract
Fee

Phase	Phase Fee	Percent Complete	Fee Earned	Prior Billing	Current Billing
Construction Documents	9,800.00	100.00	9,800.00	9,800.00	0.00
Total Fee	9,800.00		9,800.00	9,800.00	0.00
Total Fee for Billing Group					0.00
					0.00

Billing Group 02 Revisions
Professional Services

	Hours	Rate	Amount
Principal Mechanical Engineer	6.50	155.00	1,007.50
Sr Mechanical Engineering Designer	14.00	100.00	1,400.00
Engineering Designer	32.00	80.00	2,560.00
Principal Electrical Engineer	4.00	155.00	620.00
CAD Drafter	16.00	55.00	880.00
Designer	12.00	65.00	780.00
Sr Electrical Engineering Designer	6.00	100.00	600.00
Sr Mechanical/Plumbing Designer	.75	100.00	75.00
Totals	91.25		7,922.50
Total Professional Services			7,922.50

Total Current Invoice Amount \$7,922.50

Billings to Date	Current	Prior	Total	Received	A/R Balance
	7,922.50	9,800.00	17,722.50	9,800.00	7,922.50

This invoice is payable upon receipt. After 30 days, a finance charge, computed at the rate of 1.5% per month, or an annual percentage rate of 18% will be applied to the outstanding invoices.

+Timothy P. Donohue, PE
Professional Engineering and Consulting Services

PO Box 403
Cashiers, NC 28717
Phone (910) 409 3975

TO:
Mr. John Thompson, AIA
John W. Thompson Architect, PA
PO Box 1927
Leland, NC 28451

FOR:
Structural Engineering Services
The Rock Building Restoration
Monroe, North Carolina

INVOICE

INVOICE #20-053-01
DATE: MAY 31, 2020

DESCRIPTION	HOURS	RATE	AMOUNT
Professional Engineering services for site visit to the building in Monroe for inspection and mapping of existing structural components as required to prepare (pending) structural design and drawings for the proposed re-use of the building	8	\$ 145.00	\$ 1,160.00
TOTAL			\$ 1,160.00

Make all checks payable to Timothy P Donohue, PE
Total Due in 15 days. Overdue accounts subject to a service charge of 1% per month

Thank You for your Business!

Timothy P. Donohue, PE
Professional Engineering and Consulting Services

PO Box 403
Cashiers, NC 28717
Phone (910) 409 3975

TO:
Mr. John Thompson, AIA
John W. Thompson Architect, PA
PO Box 1927
Leland, NC 28451

FOR:
Structural Engineering Services
The Rock Building Restoration
Monroe, North Carolina

INVOICE #20-053-02
DATE: AUGUST 31, 2020

DESCRIPTION	HOURS	RATE	AMOUNT
Professional Engineering services for follow up site visit to the building in Monroe for coordination meeting and supplemental inspection of existing structural components, review of prior consultants plan sheets, derivation of Code prescribed building design loads and preparation of Appendix B, trace design loads through existing building framing elements and assess the structural capacity of all existing framing, and size new footings for proposed construction	16	\$ 145.00	\$ 2,320.00
TOTAL			\$ 2,320.00

Make all checks payable to Timothy P Donohue, PE
Total Due in 15 days. Overdue accounts subject to a service charge of 1% per month

Thank You for your Business!

Timothy P. Donohue, PE
Professional Engineering and Consulting Services

PO Box 403
Cashiers, NC 28717
Phone (910) 409 3975

TO:
Mr. John Thompson, AIA
John W. Thompson Architect, PA
PO Box 1927
Leland, NC 28451

FOR:
Structural Engineering Services
The Rock Building Restoration
Monroe, North Carolina

INVOICE #20-053-03
DATE: APRIL 13, 2021

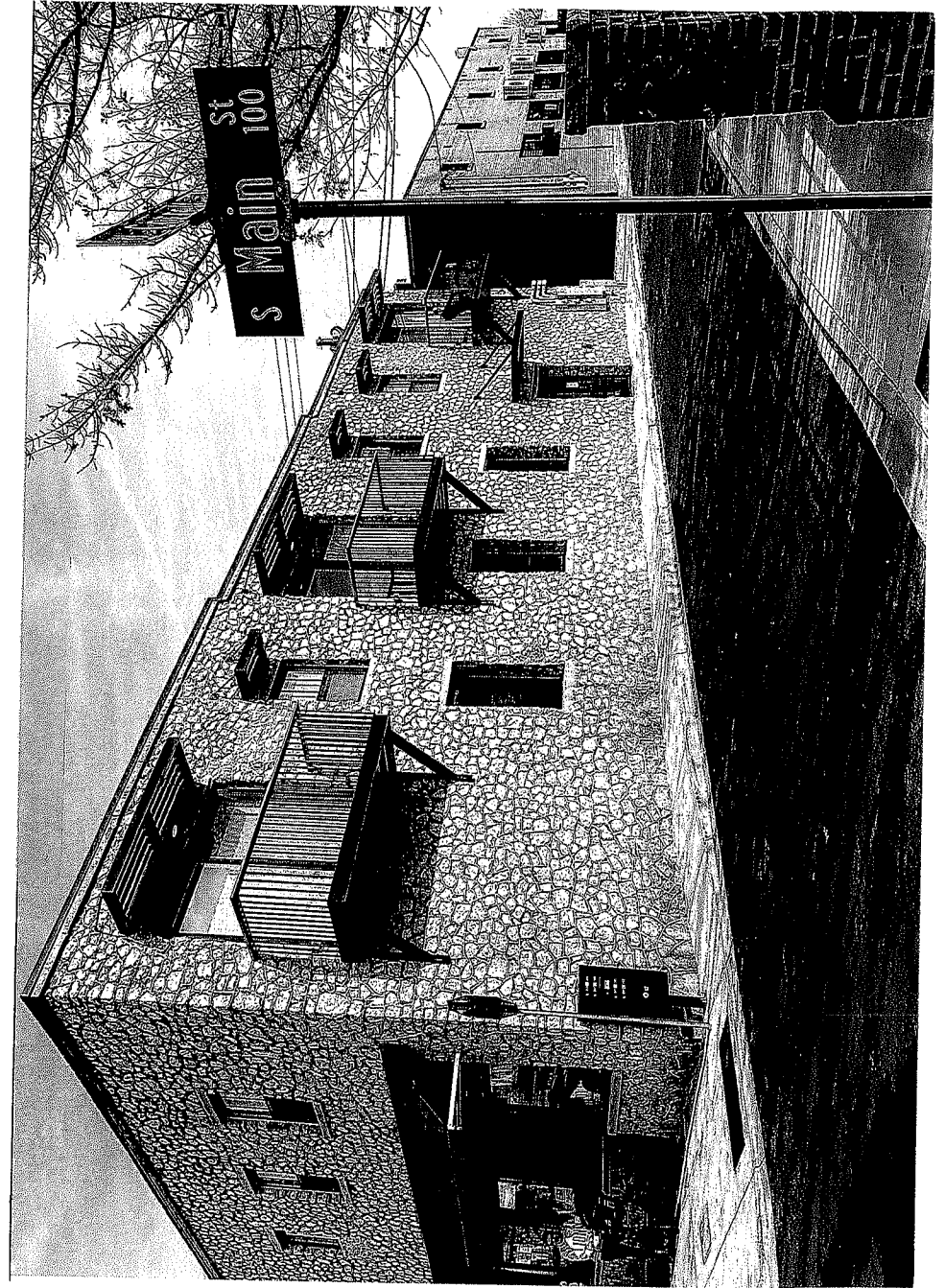
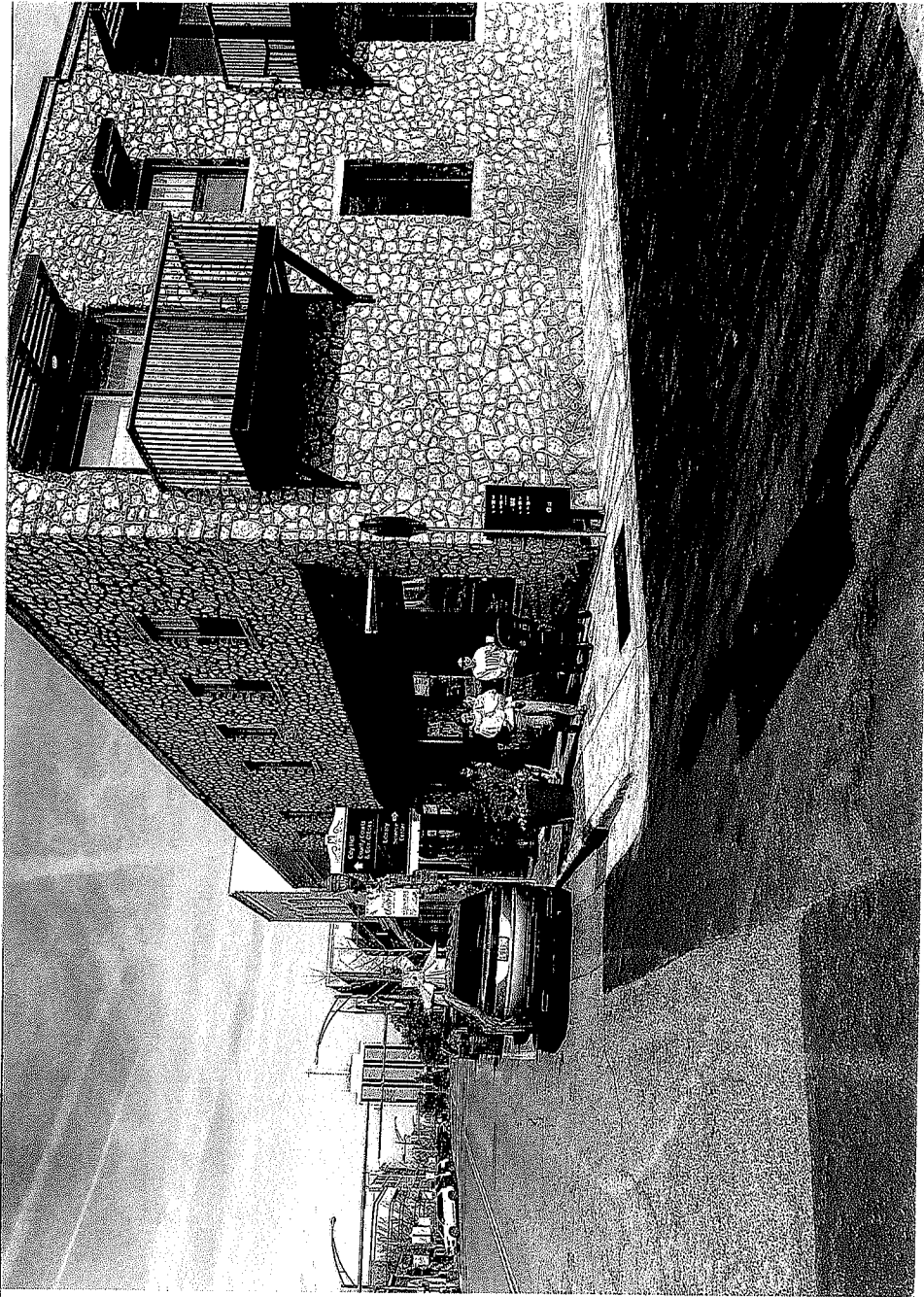
INVOICE

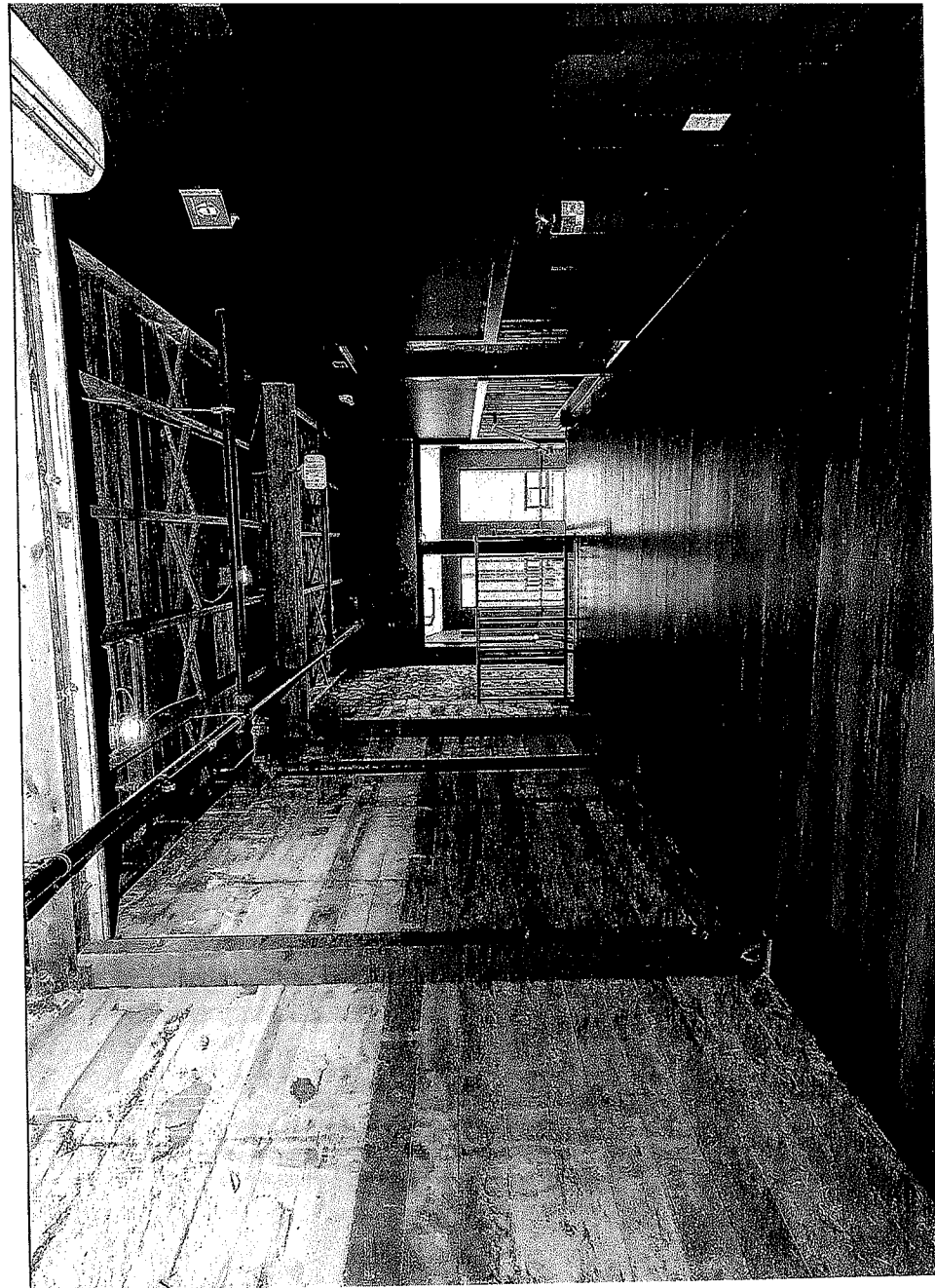
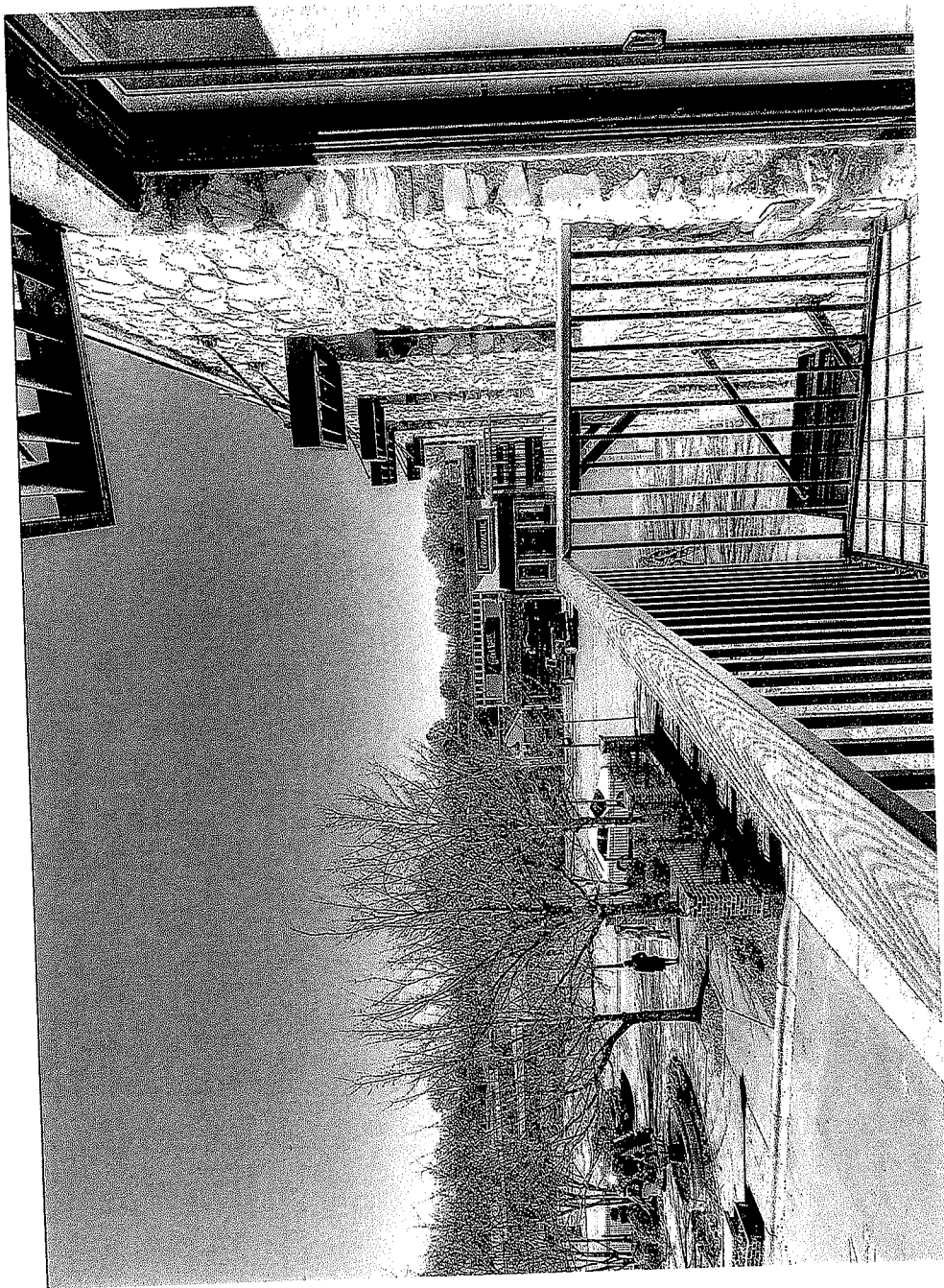
DESCRIPTION	HOURS	RATE	AMOUNT
Professional Engineering services for review of Architects draft plans and initial design review comments, follow up review of updated plans, development of sketch details and additional information to support details drafted by the Architect, evaluation of as-built foundations and design of required foundation modifications, evaluation of modifications to existing framing and design verification for new framing elements, back-check of pre-final structural plans, comments, revisions, and seal of final structural permit plans.	16	\$ 145.00	\$ 2,320.00
TOTAL			\$ 2,320.00

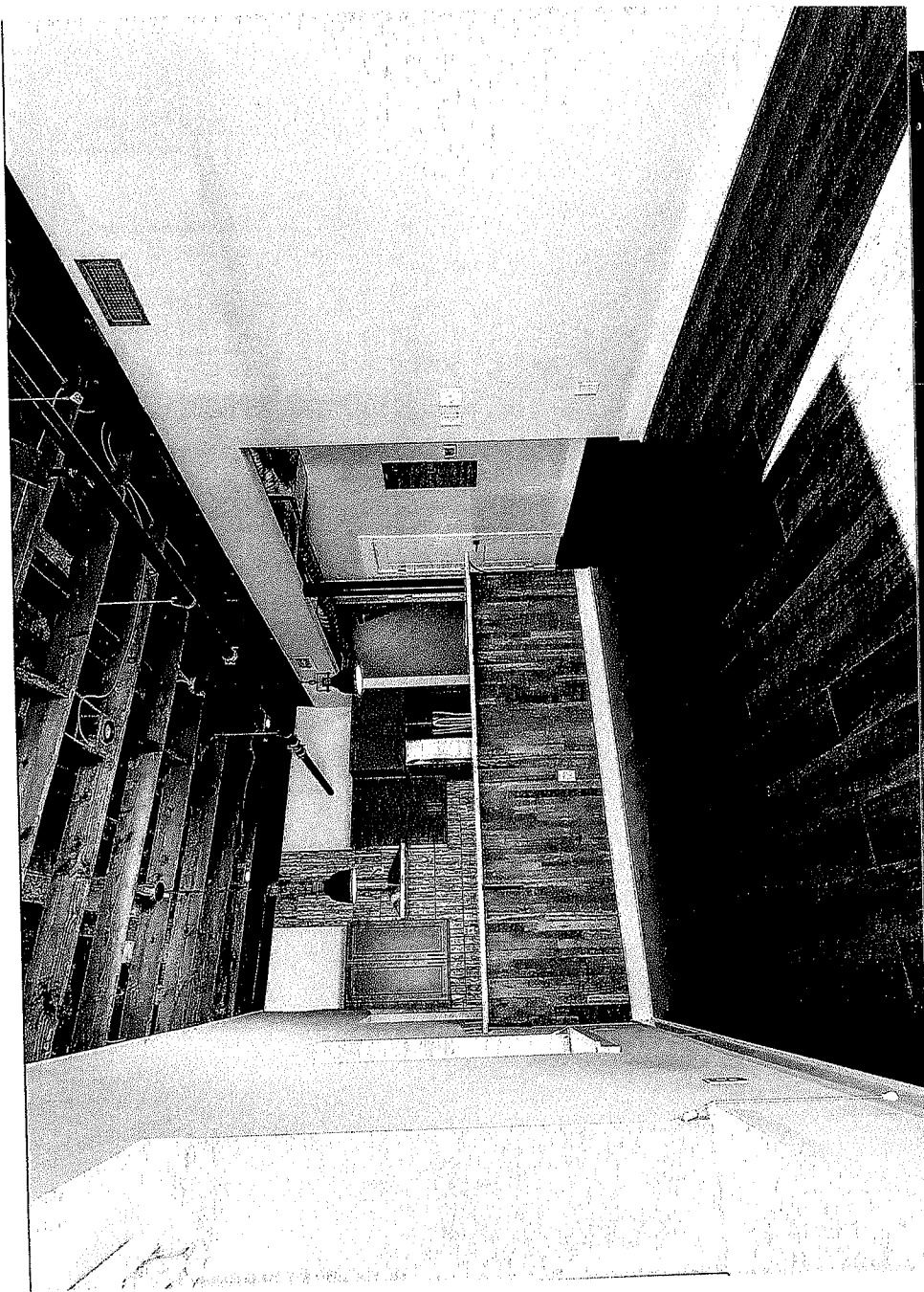
Make all checks payable to Timothy P Donohue, PE
Total Due in 15 days. Overdue accounts subject to a service charge of 1% per month

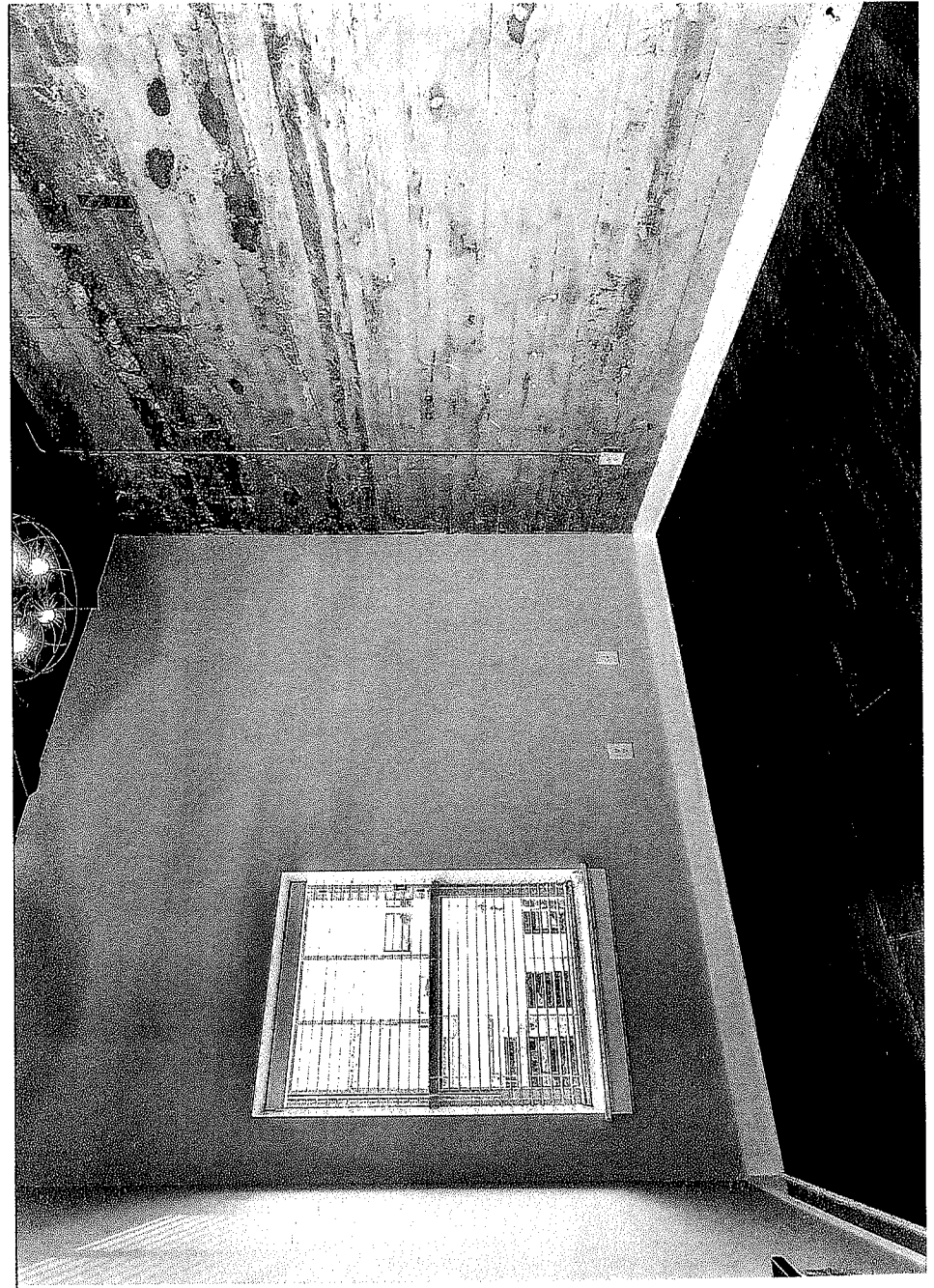
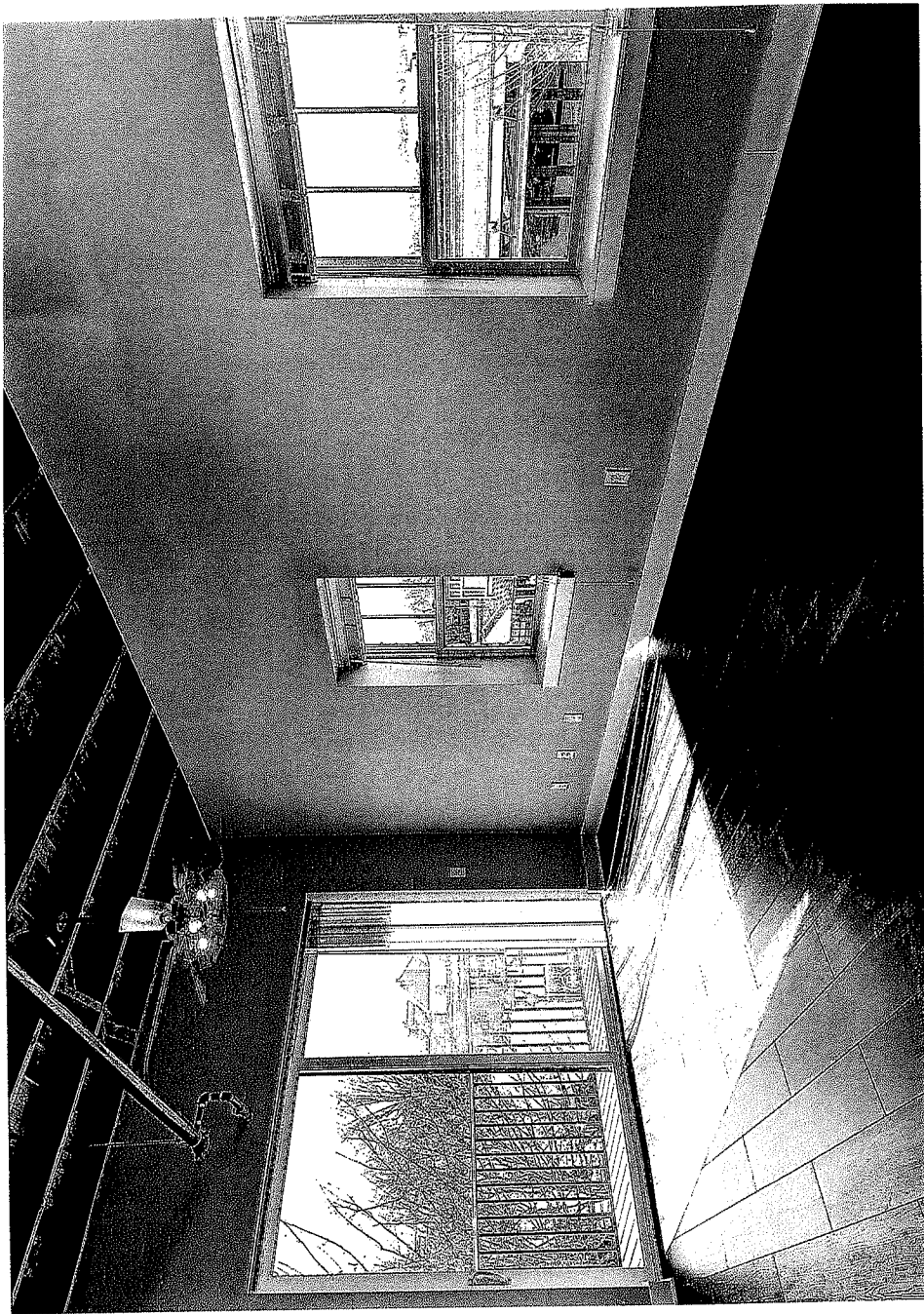
Paid Check No. 1536
19 April 2021

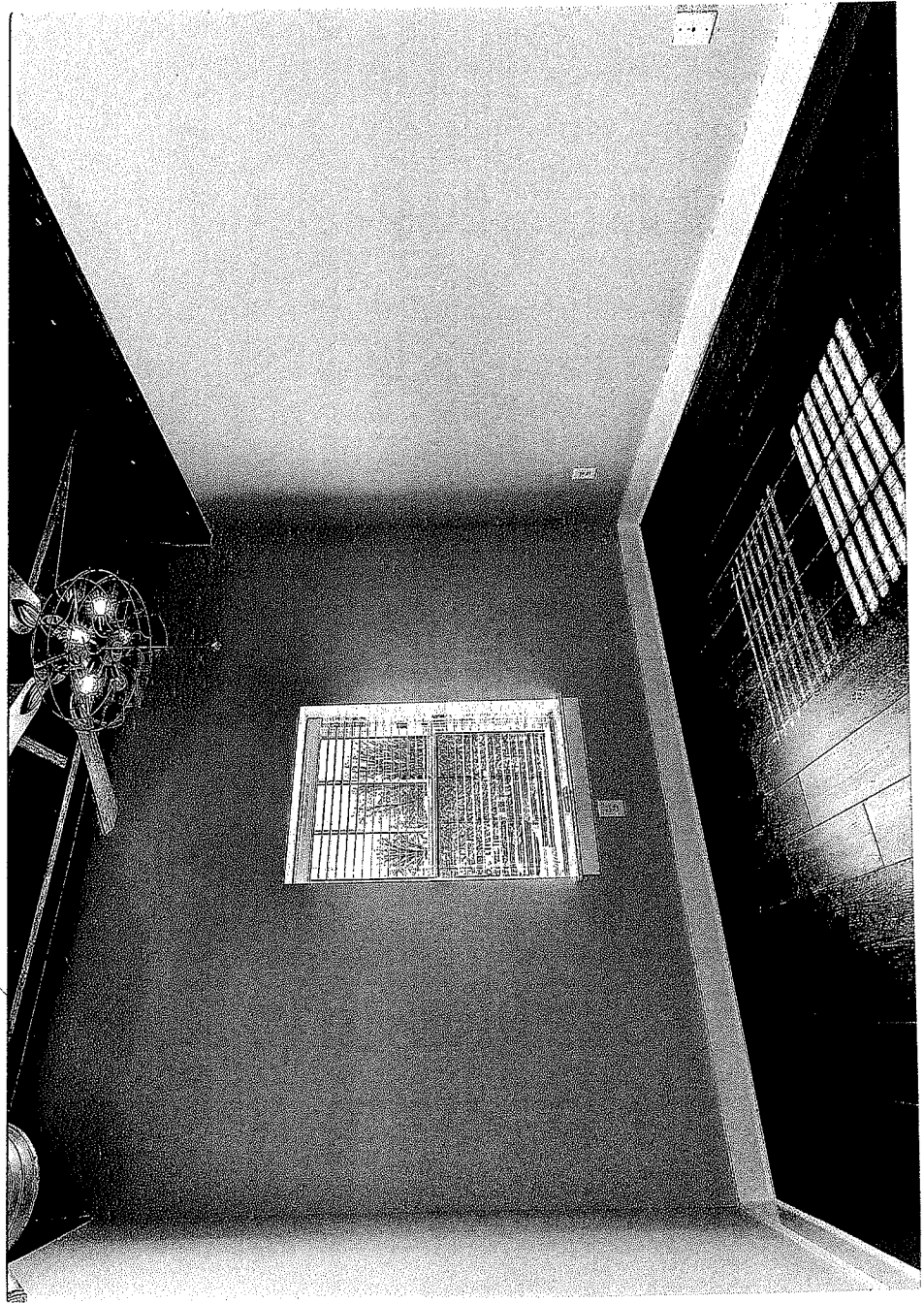
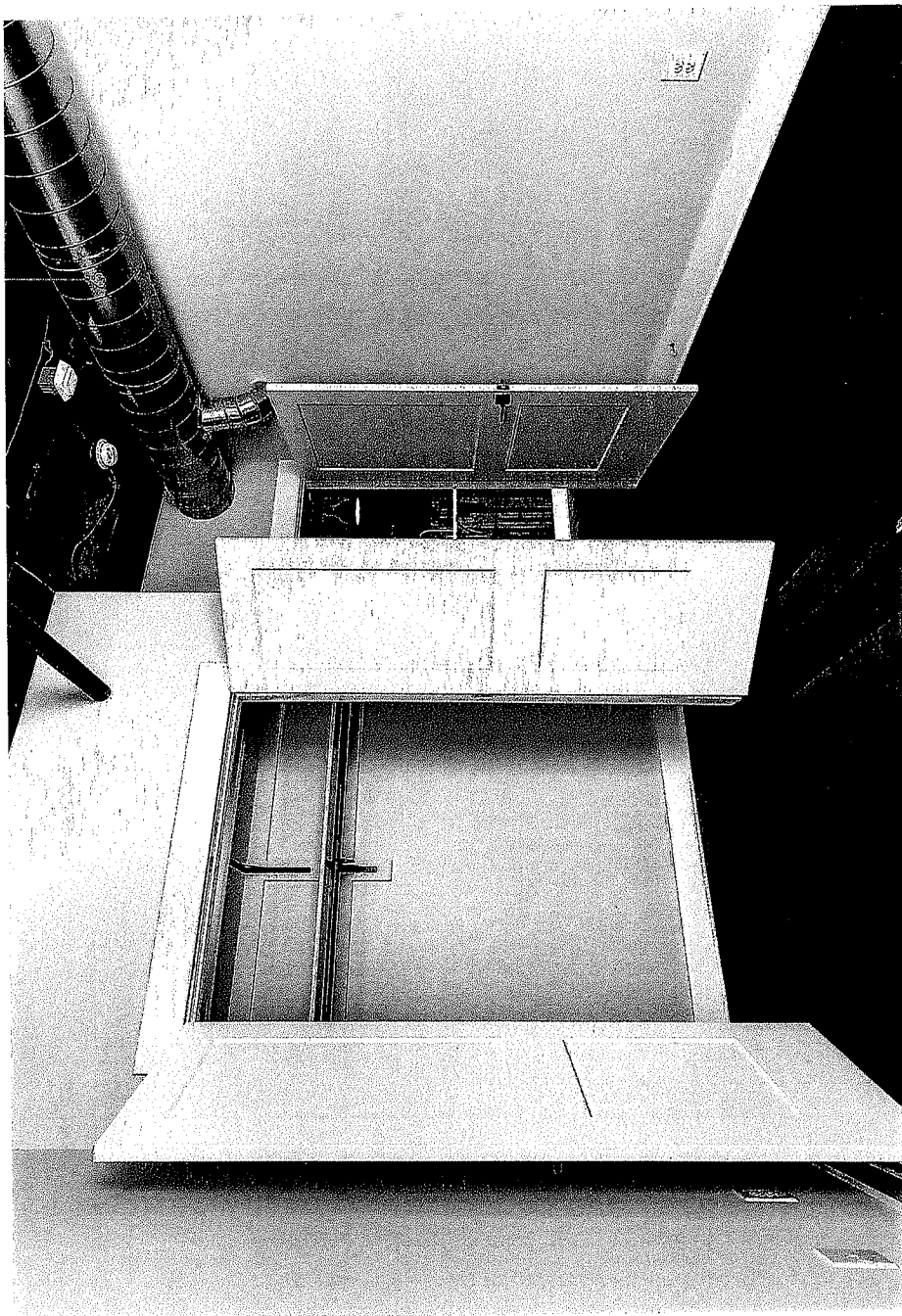
Thank You for your Business!

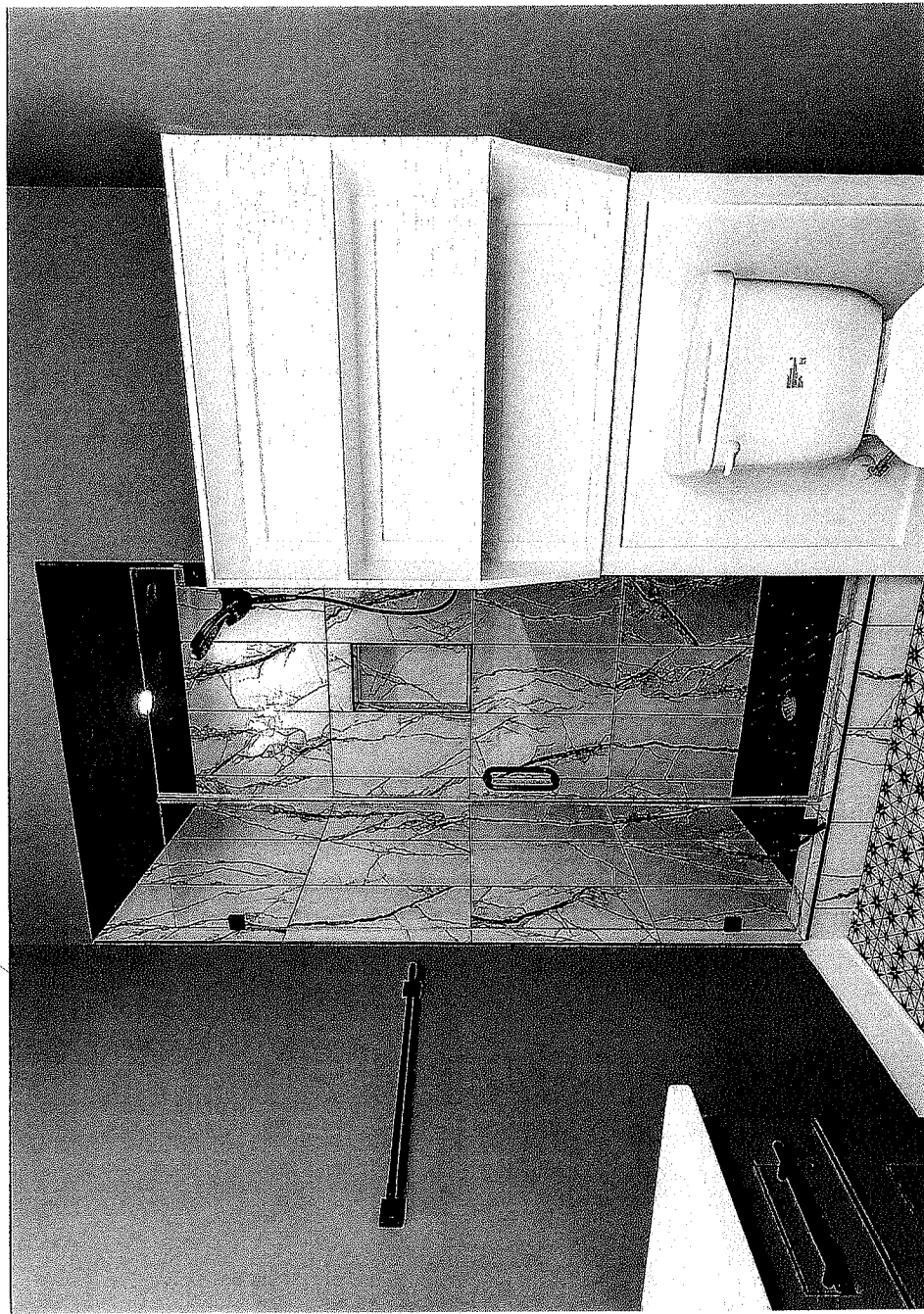
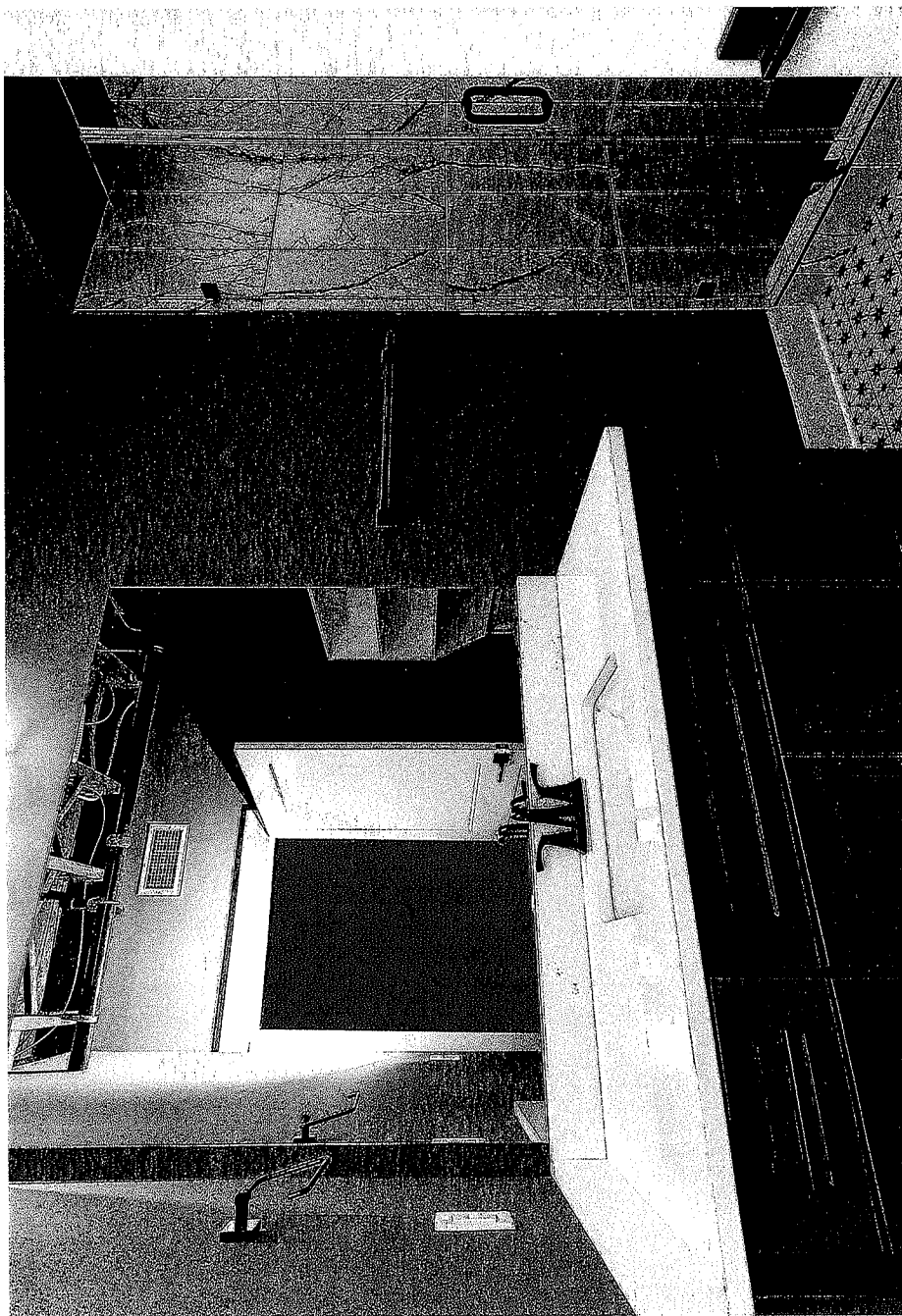


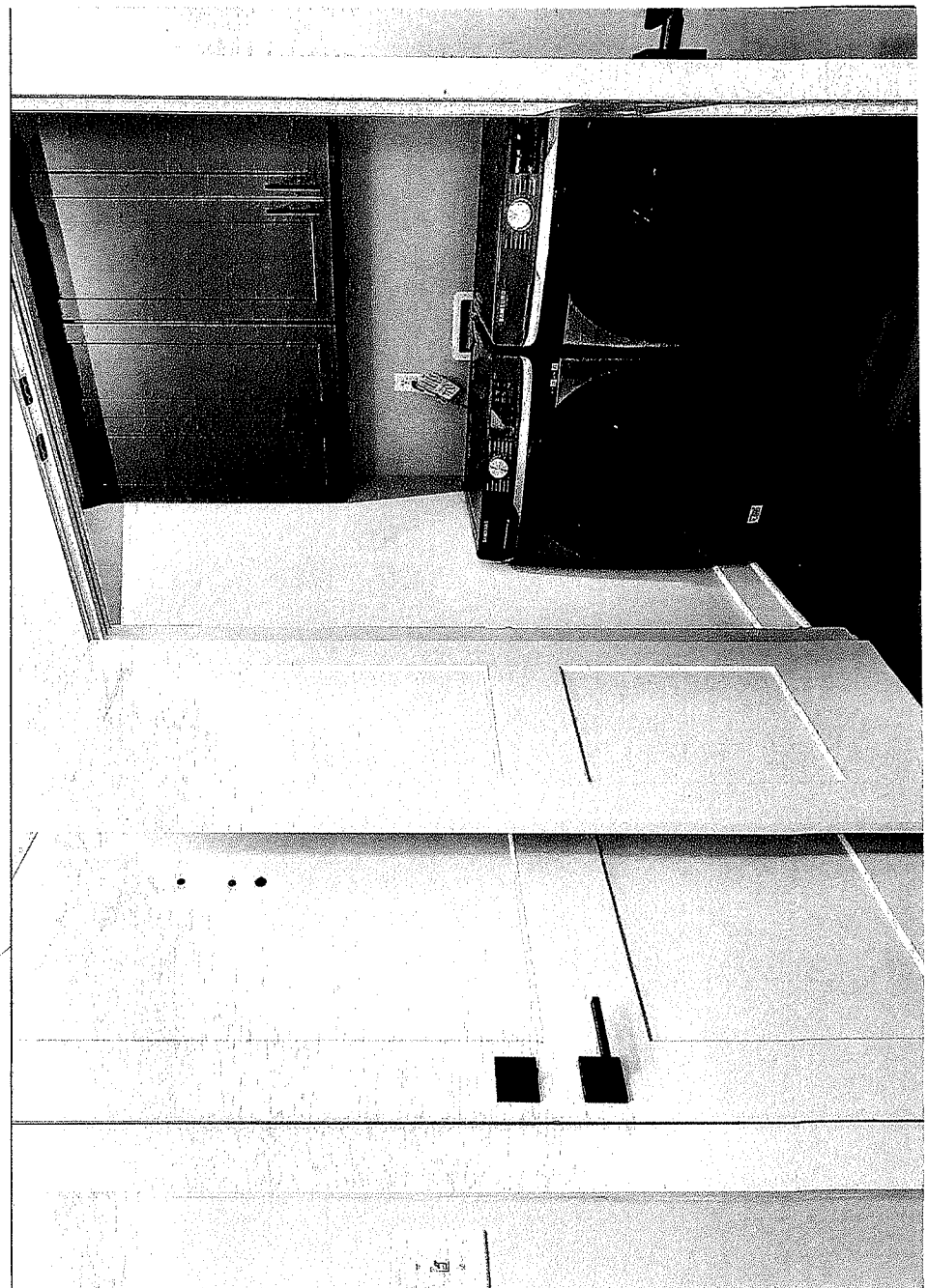
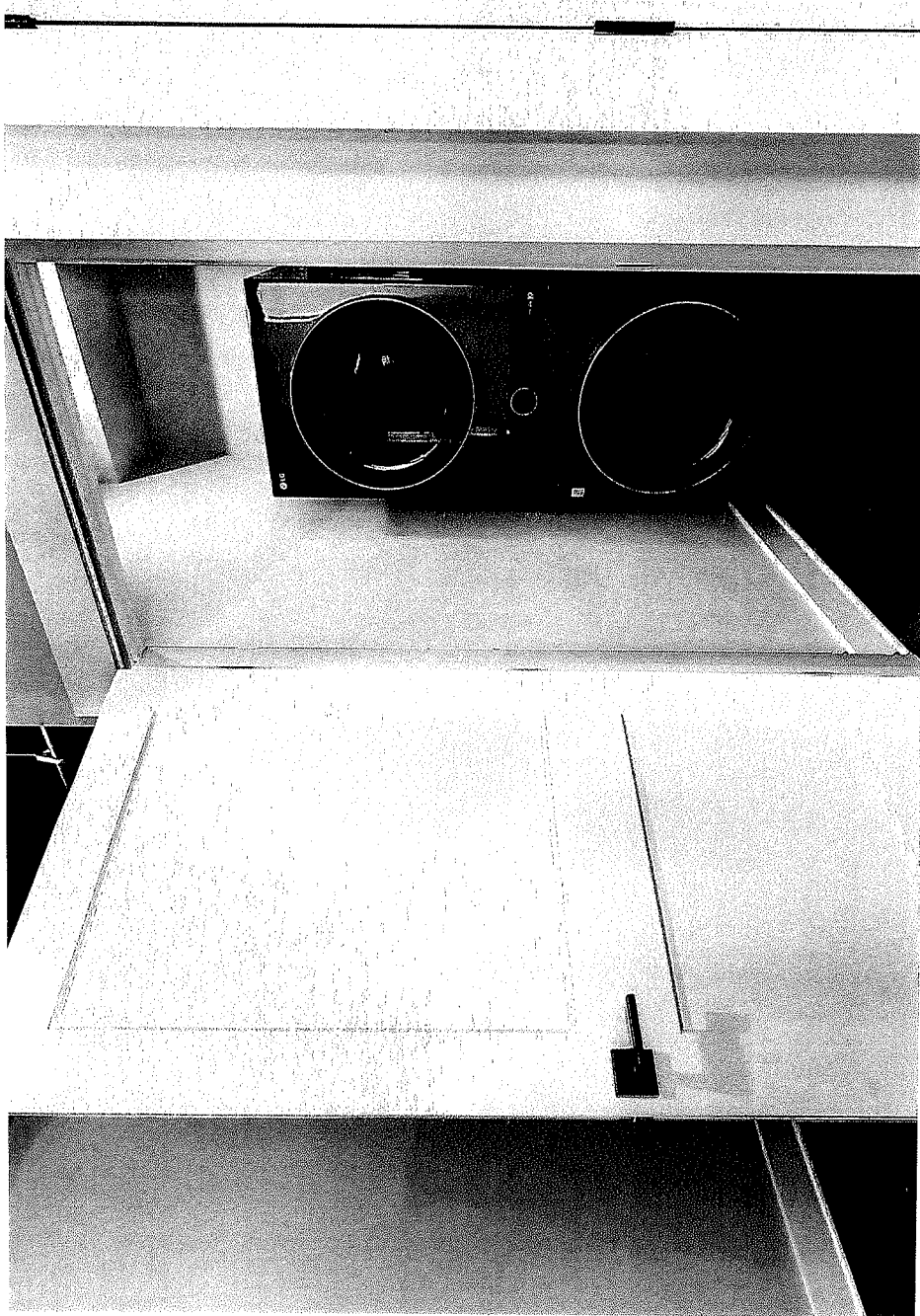














Downtown Monroe

Residential Incentive Grant

Application



Owner's Name: _____ Date: ____/____/____
Owner's Mailing Address: _____ Phone: _____

Building Name: _____
Building Address: _____
Building's Physical Address: _____

_____ Project Start: ____/____/____
_____ Project End: ____/____/____

Project Description: _____

_____ Project Cost: \$ _____

Please attach the following:
1) Color photographs of existing conditions of proposed improvement area
2) Samples of paint and wall coverings and floor coverings
3) Description of appliances, light fixtures, etc. to be installed
4) Written specifications outlining scope of work
5) Drawings of proposed renovations
6) Contractors estimate and NC License Number

Tenant's Name: _____ Phone: _____
Business Name: _____

By providing this **Grant Application** to the City of Monroe, I hereby certify for the company that all the information provided is true and correct. I also agree to cooperate with the City of Monroe by providing such information and such access to our records as may be necessary to verify the enclosed information. I also understand that any facts found to be incorrect or false, will be grounds for termination of the incentive grant agreement.

Authorized Corporate Signature: _____ Date: ____/____/____

Please Print Name and Title: _____

City of Monroe—Downtown Monroe
113 West Morgan Street • Monroe, North Carolina 28112

RIG – Residential Investment Grant

The **Residential Investment Grant** (RIG), assists with the development of residential uses in the upper levels of the buildings that reside within the Central Business District (CBD). It will encourage the inhabitation of this unused space within the downtown area and serve as a catalyst to preserve the structures that give Downtown Monroe its uniqueness.

This grant can significantly reduce the costs associated with the rehabilitation of an income producing structure by providing up to \$20 per \$100 (up to 20%) of the assessed tax value. Basing the grant on an assessment per \$100 of actual value assures that the incentive operates within the context of the building's local real estate market.

The rehabilitation of the structure must be substantial. The total rehabilitation expense must exceed a value two (2) times the amount of the grant and be completed within a 12-month period from the award date of the grant. Qualified rehabilitation expenses include costs incurred in work upon or within a structure. Expenses that **do not** qualify include the cost of acquisition or personal property. Grant monies can be paid at the completion of the project or distributed in quarters, based upon the percentage of project completion and verification of expenditures via receipts. If the project is not 100% completed, a lien can be placed on the property for the portion of outstanding monies.

Any property owner of a building within the Central Business District of the City of Monroe may apply for a RIG subject to the following:

1. The grant portion of the project must be for the interior renovation of an existing building **only**.
2. The proposed project must meet all applicable zoning requirements.
3. All required permits (i.e. zoning, building, etc) must have been obtained.
4. The proposed project follows the guidelines for renovation of historic structures or structures within historic districts as outlined herein.

This grant can significantly reduce the costs associated with the rehabilitation of an income producing structure by providing up to 20% of the assessed tax value.

Examples of Eligible Projects, include:

- Rental or Apartment Housing;
- Condominium Development for Sale;
- Hotel Development.

Guidelines:

1. *The Secretary of the Interior's Standards for Rehabilitation and the Supplementary Requirements for Development in the Central Business District* [City of Monroe Code of Ordinances Title XV, Chapter 156.054] will be used as guidelines for awarding project reimbursements.
2. Rehabilitation of a structure in the Central Business District should be considered a contemporary solution, which respects the architectural and historical integrity of the entire building while retaining those elements that enhance the building.
3. All rehabilitation design proposals must meet with the code requirements of the City of Monroe.
4. All projects should be completed within one (1) year of the date that the grant is awarded. Any extension beyond one (1) year must be requested by the owner and approved by Downtown Monroe and Monroe City Council, or the funds may be rescinded.
5. RIG's may **only** be used to finance interior improvements.
6. Upon completion, the improvements will be inspected and approved by City of Monroe staff for determination of compliance as submitted in the application.

Procedure to receive a RIG

RIG applications may be submitted to the Downtown Monroe office at any time.

1. The property owner submits a completed application, photographs, drawings, plans & specifications and contractors cost proposals to the Downtown Monroe, City of Monroe office. The package must be complete in order to qualify for funding.
2. Once Downtown Monroe, City of Monroe reviews the project, the applicant will be notified of the status of the application. Monroe City Council must approve all RIG's

following a public hearing. Construction may **not** begin until the project has been approved.

3. This is a grant program. Grant monies can be paid either upon completion of the project as certified by Downtown Monroe, City of Monroe that the work completed substantially conforms to the pre-approved plans and the project is eligible for the grant payments or Grant monies can be distributed in quarters, based upon the percentage of project completion and verification of expenditures via receipts. If the project is not 100% completed, a lien can be placed on the property for the portion of outstanding monies. It takes approximately two (2) weeks after approval of the project to receive the grant monies.

Questions about the RIG Program:

What is RIG?

RIG, the Residential Investment Grant, is an incentive to taxpaying entities who contribute to the residential rehabilitation of buildings in the Central Business District of downtown Monroe. RIG provides up to \$20 per \$100 (up to 20%) of assessed value, which assures that the incentive operates within the context of the building's local real estate market.

Who may apply for the grant?

Taxpaying entities that own an eligible structure(s) located within the Central Business District of Downtown Monroe.

What buildings are eligible?

All existing buildings within the Central Business District of Downtown Monroe that have the ability to convert into multiple residential units are eligible.

What rehabilitation expenditures qualify?

Interior improvements that meet the Secretary of the Interior's "Standards for Rehabilitation" and the City of Monroe's Design Standards.

Includes: rehabilitation costs, construction interest and taxes, architectural and engineering fees, legal and professional fees, developer's fees and general administrative costs.

Does not include: acquisition costs, enlargement costs, acquisition interest and taxes, Realtor's fees, paving and landscaping costs, sales and marketing costs, or new building construction costs.

When can a taxpayer claim the grant?

Only after the completion of the project are grant payments made and the audit of the expenditures performed.

What other restrictions apply?

Downtown Monore, City of Monroe and the Monroe City Council must approve the project. Approval of applications must occur prior to the commencement of any work. Grant applications shall be reviewed by City staff, Finance Committee and City Council for approval.

Example:

2000 assessed total value \$114,222

Grant value is \$10.00 per \$100 (10%) of the property's assessed total value

RIG Value = \$11,422

Minimum Private Investment: $(\$11,422 \times 2) + 1 = \underline{\$22,845}$

Total Investment: \$34,267