

# HOME EQUITY INVOICE AGREEMENT©

## CONTRACTOR SEARCH FOR LIAISON

LOOKING FOR PROJECTS OR MANAGING ONE ALREADY? PARTNER WITH A HEIA LIAISON TO OFFER EQUITY PAYMENT OPTIONS TO HOMEOWNERS, UNLOCKING NEW WEALTH-BUILDING OPPORTUNITIES FOR YOU. COMPLETE AS MUCH OF THE FORM AS YOU CAN AND START BUILDING EQUITY, NOT JUST CASH!

### BUSINESS INFORMATION

COMPANY NAME:[\_\_\_\_\_]

WEBSITE:[\_\_\_\_\_]

ADDRESS:[\_\_\_\_\_]

PHONE:[\_\_\_\_\_]

EMAIL:[\_\_\_\_\_]

SERVICE AREAS:[\_\_\_\_\_]

BIO:

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### SKILLS

YEARS OF EXPERIENCE:[\_\_\_\_\_]

SKILLS:

- ☐ GENERAL CONSTRUCTION
- ☐ PROJECT MANAGEMENT
- ☐ ELECTRICAL
- ☐ PLUMBING
- ☐ HVAC
- ☐ STRUCTURAL/MECHANICAL
- ☐ ROOFING
- ☐ SOLAR
- ☐ SIDING
- ☐ PAINTING
- ☐ FLOORING
- ☐ LANDSCAPING
- ☐ OTHER:\_\_\_\_\_.

PROPERTY TYPE:

- ☐ COMMERCIAL
- ☐ RESIDENTIAL

CAPABILITIES:

DESCRIBE THE AVAILABLE MANPOWER YOU HAVE

- ☐ LIGHT RENOVATIONS
- ☐ MEDIUM REMODELS
- ☐ HEAVY REMODEL/NEW BUILD

### PAYMENT PREFERENCE

MINIMUM CASH DOWN PAYMENT [\_\_\_\_\_%], IF REQUIRED FROM PROJECT

MINIMUM MONTHLY CASH PAYMENT [\$\_\_\_\_\_], IF REQUIRED FROM PROJECT

MAXIMUM AMOUNT WILLING TO BE PAID IN EQUITY INSTEAD OF CASH [\$\_\_\_\_\_]

HOW LONG ARE YOU WILLING TO STRUCTURE HOME EQUITY INVOICE AGREEMENTS? [\_\_\_\_\_]

DESIRED PROFIT MARGIN [\_\_\_\_\_%]

### PROPERTY

IF YOU HAVE A PROPERTY READY FOR A HEIA LIAISON, PLEASE PROVIDE AS MUCH DETAIL AS POSSIBLE.

HOMEOWNER:[\_\_\_\_\_]

ADDRESS:[\_\_\_\_\_]

COST OF WORK:[\$\_\_\_\_\_]

MINIMUM PROFIT MARGIN:[\_\_\_\_\_%]

# HOME EQUITY INVOICE AGREEMENT©

## LIAISON

### SCOPE OF WORK:

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LICENSED HEIA LIAISONS CAN PROVIDE A VARIETY  
OF ASSISTANCE WITH A REAL ESTATE PROJECT.  
SELECT ALL THAT APPLY

### ASSISTANCE NEEDED:

- ☐ HEIA SETUP AND FILLING
- ☐ PROJECT MANAGEMENT/OTHER  
TRADES NEEDED
- ☐ FINANCIAL STRUCTURING
- ☐ COORDINATION/COMMUNICATION  
WITH HOMEOWNER
- ☐ CASH PAYMENTS
- ☐ PROPERTY VALUATION
- ☐ PAYING SUBCONTRACTORS IN EQUITY  
INSTEAD OF CASH
- ☐ OTHER: \_\_\_\_\_.

## PROJECT STATUS

HAS THE HOMEOWNER AGREED TO THE COST  
OF WORK AND PAYMENT TERMS?

- ☐ YES
- ☐ NO
- ☐ NOT YET PRESENTED

HAS THE HOMEOWNER BEEN NOTIFIED A  
HEIA LIAISON WILL BE NEEDED?

- ☐ YES
- ☐ NO

HAS THE HOMEOWNER AGREED TO PAY ANY  
CASH PAYMENTS?

- ☐ YES
- ☐ NO
- ☐ NEGOTIABLE

WHAT CHALLENGES HAVE YOU  
ENCOUNTERED SO FAR IN THIS PROJECT?

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WHAT OUTCOMES ARE YOU HOPING TO  
ACHIEVE WITH A HEIA LIAISON'S HELP?

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