

# AIA Contracts

**Michael R. Keller, P.E.**

*Irby Engineering & Construction, Inc.*

**J.D. Smith**

*McDonald, Fleming, Moorhead, Ferguson, Green,  
Smith, Blankenship, Heath & de Kozan, LLP*

**Daniel W. Uhlfelder, Esq.**

*Daniel W. Uhlfelder, P.A.*

This seminar is designed for attorneys, presidents, vice presidents, owners, project managers, architects, engineers, controllers, accountants and contractors.

**PENSACOLA, FL**

**JULY 15, 2008**

**CONTINUING EDUCATION CREDIT**

AIA 6.50

CC 1.0

FL CLE 8.00

FL Construction Contractors (Pending)

FL ENG 8.0

IACET 0.65

CPE 8.0

PMI 6.50

[www.lorman.com](http://www.lorman.com)

*Keeping You Current.*

*Helping You Succeed.®*

**LORMAN®**  
**EDUCATION SERVICES**  
A DIVISION OF LORMAN BUSINESS CENTER, INC.

# Critical Issues on the Agenda

Pensacola Civic Center • 201 East Gregory Street  
850-432-0800  
Pensacola, FL • July 15, 2008

8:00 AM – 8:30 AM **Registration**

8:30 AM – 10:30 AM **Uses of the AIA Documents**

— Michael R. Keller, P.E.

- Overview of AIA Format
- Case Studies

10:30 AM – 10:40 AM **Break**

10:40 AM – 12:40 PM **Roles and Responsibilities**

— J.D. Smith

- Contractor
- Owner
- Architect

## **Oversight and Document Review**

- Project and Player Selection
- Contract Documents and Risk Allocation
- Project Documentation
- Symptoms of a Litigation Bound Project
- Closeout Documents

12:40 PM – 1:40 PM **Lunch (On Your Own)**

1:40 PM – 3:40 PM **Payment and Performance Bond Issues, and AIA Contracts**

— Daniel W. Uhlfelder, Esq.

## **Construction Liens and AIA Contracts**

— Daniel W. Uhlfelder, Esq.

3:40 PM – 3:50 PM **Break**

3:50 PM – 4:30 PM **Questions and Answers**

— Michael R. Keller, P.E., J.D. Smith and

Daniel W. Uhlfelder, Esq.

*Lorman Education Services reserves the right to modify  
the agenda and the faculty when circumstances are beyond our control.*

Visit  
[www.lorman.com](http://www.lorman.com)  
for a complete  
list of seminars.



# Registration

## AIA Contracts Pensacola, FL • July 15, 2008



**Email:** [customerservice@lorman.com](mailto:customerservice@lorman.com)

**Website:** [www.lorman.com](http://www.lorman.com)



**Telephone:** 866-352-9539

**Fax:** 715-833-3953



**Mail:** Mail this form with payment information to  
Lorman Education Services, Dept. 5382, P.O. Box 2933,  
Milwaukee, WI 53201-2933

**Best Value**

Includes a CD  
recording of this  
seminar with your  
registration

**Seminar Tuition** (includes free manual with attendance)

\$339 for a single registrant

\$329 each for two or more from the same organization

\$438 for a single registration (\$339) plus CD recording (\$99\*) of this seminar - **Best Value** -

**To Order Products From This Seminar** Please allow four to six weeks after the date of the seminar for delivery.

\$359 CD/manual package\*  \$119 manual only\*

\*Add \$7 shipping/handling, plus applicable sales tax, to product orders. If tax-exempt, please include your certificate.

*Lorman Education Services is not approved to offer self-study CPE credit for accountants; therefore, no CPE will be given for this program if ordered as a self-study package.*

*If you need special accommodations, please contact us two weeks in advance of the program.*

**Names of Attendees** (Please print clearly) **Priority Code** \_\_\_\_\_ **Discount Code** \_\_\_\_\_

1. Name \_\_\_\_\_

Title \_\_\_\_\_ Email \_\_\_\_\_

2. Name \_\_\_\_\_

Title \_\_\_\_\_ Email \_\_\_\_\_

Firm Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State/Zip \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_\_) \_\_\_\_\_

**Approving Manager**

Name \_\_\_\_\_

Title \_\_\_\_\_ Email \_\_\_\_\_

Check enclosed payable to **Lorman Education Services**

Charge to credit card \_\_ AE \_\_ MC \_\_ VISA Signature \_\_\_\_\_

Card number \_\_\_\_\_ Exp. Date \_\_\_\_\_

© 2008 Lorman Education Services. All rights reserved.

**Cancellations:** Substitute registrants are welcome and may be named at any time. If you cancel six or more business days in advance, you will receive a full refund, less a \$20.00 service charge. If you cancel within five business days you are not entitled to a cash refund. However, as a courtesy, we will allow you to apply your payment toward any future Lorman seminar within one year from the date you cancel. Please note that if you do not attend and you do not cancel as described above, you are responsible for the entire payment. Lorman disclaims any liability for any other direct or compensatory payment.

**Seminar ID: 370718**



## Lorman Bookstore

ORDER ONLINE

Visit us at [www.lorman.com](http://www.lorman.com) to get more information on these and other products, and to download electronic manuals immediately. Our policy is to fill all orders with the most recent editions available. Your bookstore item(s) will be shipped within three to five business days, upon receipt of your order.

**Construction Insurance, Bonding and Liens** – Insurance Considerations; Projects and Properties That Cannot Be Made Subject to Construction Lien; Practical Aspects of Lien Preparation; Florida Private Project Bonds; Florida Public Project Bonds.

**Item: 375447** CD and Manual \_\_\_@ \$169 Manual \_\_\_@ \$79 E-Manual \_\_\_@ \$79

**The Fundamentals of Construction Contracts: Understanding the Issues** – Essential Construction Contract Terms; Avoiding Future Problems by Addressing Key Issues; Alternative Dispute Resolution; Contract Clauses; Surety Bonds.

**Item: 372349** CD and Manual \_\_\_@ \$169 Manual \_\_\_@ \$79 E-Manual \_\_\_@ \$79

**What to Do When Construction Projects Go Bad** – Identifying and Measuring "Bad"; Taking Action When "Bad" Occurs; Alternative Dispute Resolution; Termination; Pursuing Sureties; Construction Liens and Lien Avoidance.

**Item: 372006** CD and Manual \_\_\_@ \$169 Manual \_\_\_@ \$79 E-Manual \_\_\_@ \$79

<b>Subtotal From Above</b>	\$ _____
<b>Shipping &amp; Handling (excludes e-manuals)</b>	\$ _____
(\$7.00 first item, \$1.00 each additional)	
<b>Sales Tax</b>	\$ _____
<b>TOTAL</b>	\$ _____

# Our Distinguished Faculty

**Michael R. Keller, P.E.**, is vice president of Irby Engineering & Construction, Inc., in Pensacola. Mr. Keller is a former U.S. Navy Civil Engineer Corps officer with 20 years of experience in construction engineering. Mr. Keller has both commercial and governmental experience in the identification of maintenance issues, failures and problems in a wide variety of facilities throughout the United States. He has led construction teams using a variety of specifications and standards in North America, Europe, eastern Africa and southwest Asia. Mr. Keller also led a 31-person team that provided a wide array of support to the Standing Joint Force Headquarters-Homeland Security while serving as the staff engineer for the organization. Most recently, he has been involved with the restoration of three condominium towers that were devastated after Hurricane Ivan and leading a team that is providing daily engineering services to the Public Works Department at Naval Air Station Pensacola. He holds a B.S. degree in electrical engineering from The Citadel in Charleston, South Carolina. He is a life member of the Tau Beta Pi Engineering Honor Society. Mr. Keller is a professional engineer in the commonwealth of Virginia and the state of Florida.

**J.D. Smith** is a partner in the law firm of McDonald, Fleming, Moorhead, Ferguson, Green, Smith, Blankenship, Heath & de Kozan, LLP, where he concentrates his practice on construction law and business litigation. He received his B.S. degree in engineering sciences from the U.S. Air Force Academy, his M.B.A. degree from Louisiana Tech University and his J.D. degree from the University of Florida College of Law. Mr. Smith is board certified

in business litigation by The Florida Bar. He has represented general contractors, subcontractors, architects, engineers and sureties in all aspects of the design, construction and dispute resolution process.

**Daniel W. Uhlfelder, Esq.**, has a general practice Florida law firm in Grayton Beach, providing advice, service, representation and litigation services in a full range of legal issues, including real estate law and property development, real estate litigation, construction law and litigation, business law and litigation, personal injury, criminal defense, employment law, family law and divorce, probate litigation, assistance with hurricane damage insurance claims and hurricane-related construction problems. With the growing commercial and residential property developments along Florida's panhandle, including Panama City Beach, Pensacola, Fort Walton Beach and Destin, there are numerous real estate contracts, construction contracts and other property development agreements entered into daily. Mr. Uhlfelder spends a good amount of his practice representing homeowners, builders, contractors, real estate agents, subcontractors, developers and other parties in complex real estate, commercial and business disputes. He is a graduate of Stanford University and the University of Florida College of Law. He is admitted to practice before all federal courts in the state of Florida. Mr. Uhlfelder is a member of The Florida Bar's 1st Circuit Unlicensed Practice of Law Committee. He was recently appointed by former Gov. Jeb Bush to the newly created Committee for a Sustainable Emerald Coast.

*Previous attendee comment from another Lorman seminar:*

**“Effectively brings an awareness of ramifications of changes in AIA documents.”**

— *Robert Bosserman, Architect*

## Additional Educational Opportunities



**Teleconferences:** Not able to commit to a full day? Teleconferences are now available. Visit us at [www.lorman.com/teleconference](http://www.lorman.com/teleconference) for a complete listing of teleconferences.



**In-House Corporate Training:** If you have a group of 10 or more, it may be beneficial for you to schedule a seminar at your facility. Contact Lorman or email us at [inhouse@lorman.com](mailto:inhouse@lorman.com) to inquire about in-house training on this or other topics.



**Partnerships:** You could earn a referral bonus by becoming a Lorman partner. Visit [www.lorman.com/contact/associations.php](http://www.lorman.com/contact/associations.php) or call John Kreiner at 800-678-3940.

# Seminar Highlights

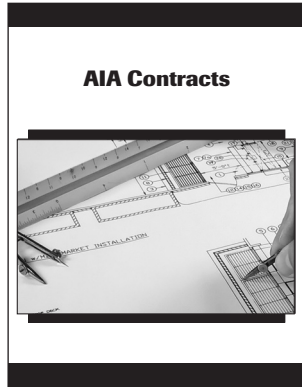
**Get ready – the AIA document revisions are here, and they’re going to affect your practices.**

AIA documents affect every aspect of your project – and they’ve just been changed in some major ways. You need to know how these revisions will impact how you do your job. Come to this informative seminar and learn how the new documents affect the roles and responsibilities of each participant in the project. You’ll explore how recent trends in the industry have helped change dispute resolution provisions, bond issues and much more. AIA contracts are too important for you to ignore – register today and we’ll shed some light on the documents and their revisions.

**Free Manual  
With Attendance**

## Benefits for You

- Know your responsibilities when it comes to project documentation
- Determine the pros and cons of the revisions – including dispute resolution and other hot-button issues
- Navigate through project and player selection
- Find out how roles and duties of each party have changed with the new documents
- Avoid the pitfalls of misunderstanding the widely used AIA forms



# Continuing Education Credit

*Please remember to bring your license number, ID or other necessary information to the seminar. This will ensure timely reporting of continuing education credit. Please see our website at [www.lorman.com](http://www.lorman.com) for further details about continuing credit information.*

Lorman Business Center, Inc. has been approved as an Authorized Provider by the International Association for Continuing Education and Training (IACET), 8405 Greensboro Drive, Suite 800, McLean, VA 22102. In obtaining

this approval, the Lorman Business Center, Inc. has demonstrated that it complies with the ANSI/IACET Standards which are widely recognized as standards of good practice internationally. As a result of their Authorized Provider membership status, Lorman Business Center, Inc. is authorized to offer IACET CEUs for its programs that qualify under the ANSI/IACET Standards. Lorman Business Center, Inc. will award 0.65 CEUs to participants who successfully complete this program. Participants must complete an evaluation in order to receive CEUs. Please verify applicability with your professional board before attending.

## IACET Learning Objectives

The attendee will be able to:

- discuss uses of the AIA documents
- identify roles and responsibilities
- review payment and performance bond issues



Lorman Education Services is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Website: [www.nasba.org](http://www.nasba.org). CPE Credit: Maximum Credit Hours: 8.0 each session (based on a 50 minute credit hour). Field of Study: Management Advisory Services. Prerequisite: basic knowledge of construction law. Level of Knowledge: Intermediate. Teaching Method: Seminar/Lecture. Advance Preparation: None. Delivery Method: Group-Live.

Please refer to the information in this brochure for outline, course content and objectives. Upon completion of this course, you will receive a certificate of attendance. Final approval of a course for CPE credit belongs with each state’s regulatory board.

Lorman Business Center, Inc. is a recognized provider registered with the PMI Registered Educational Provider Program (PMI R.E.P.). Lorman Business Center, Inc. accepts and adheres to all PMI R.E.P. Program policies, requirements and rules concerning the provision of professional education activities and materials. This course qualifies for 6.50 PDU’s.



Lorman Business Center, Inc. is registered with the AIA Continuing Education System (AIA/CES). This 6.50 hour program offers 6.50 Learning Unit hours, which will be reported directly to the AIA/CES for AIA members.



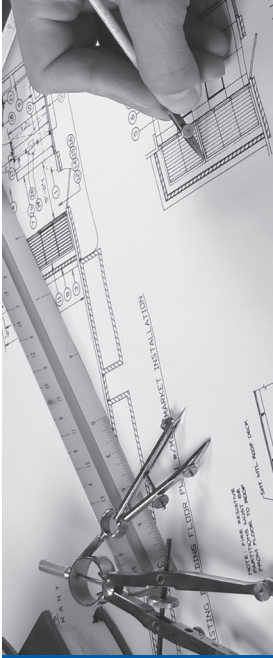
This course has been reviewed and approved for inclusion in the Construction Compliance™ Certification Program and qualifies for 1.0 credit. Please visit [www.lorman.com/certification/cc](http://www.lorman.com/certification/cc) for more information.

This course has been approved by The Florida Bar for 8.00 hours of CLE credit.

This course has been approved by The Florida Bar Certification Plan in the area of Construction Law for 8.00 hours. Course classification: Intermediate level.

This program has been submitted to the State of Florida Department of Business and Professional Regulation, Construction Industry Licensing Board. Approval pending.

This course has been approved for 8.0 PDHs by the Florida Board of Professional Engineers in the Areas of Practice.



# PENSACOLA, FL      JULY 15, 2008

## Benefits for You

- Know your responsibilities when it comes to project documentation
- Determine the pros and cons of the revisions – including dispute resolution and other hot-button issues
- Navigate through project and player selection
- Find out how roles and duties of each party have changed with the new documents
- Avoid the pitfalls of misunderstanding the widely used AIA forms



# AIA Contracts

**EXPRESS REGISTRATION - Sign up at [www.lorman.com](http://www.lorman.com) using the seminar ID # listed below**

**Seminar ID: 370718**

**! Includes 2007 Updates to  
AIA Contract Documents**

Presorted Standard  
U.S. Postage Paid  
Permit No. 1877  
Eau Claire, WI

**Priority Code: 17129**

**LORMAN®**  
**EDUCATION SERVICES**  
A DIVISION OF LORMAN BUSINESS CENTER, INC.