



Senior Living Qualifications



Wharton-Smith, Inc.
CONSTRUCTION GROUP

The Construction Group of Choice

Preconstruction ▪ Construction Management ▪ General Contracting ▪ Sustainable Building ▪ Design-Build

ABOUT WHARTON-SMITH

CORPORATE OFFICE

Wharton-Smith
750 Monroe Road
Sanford, FL 32771
Ph: (407) 321-8410
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KEY CONTACT

Darin Crafton,
Executive Vice President -
Commercial
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TYPES OF SERVICES

General Contracting
Construction Management
Preconstruction
Design-Build
Sustainable Construction
Self-performance

HIGHLIGHTS

- Wharton-Smith was founded in 1984
- Headquartered in Sanford, FL
- 10 offices throughout the Southeast United States
- 620 Construction Professionals
- Ranked *ENR* Top 400 Contractor



George E. Smith (left) - Chairman of the Board;
Ronald F. Davoli (right) - President/CEO

Wharton-Smith, Inc. is a privately held corporation founded in 1984 in Sanford, Florida founded by George Smith and Bill Wharton, who envisioned growing a company that would encompass strong work ethics and have a positive impact within the communities that we serve. An *Engineering News-Record (ENR)* Top 400 Contractor with a strong financial backing, Wharton-Smith continues to uphold those founding ideals under the leadership of Ron Davoli, President/CEO. As a result, the firm has built a solid reputation throughout the Southeastern United States.

Headquartered in Sanford, Florida, Wharton-Smith operates 9 full-service branch offices in Gulfport, MS; Baton Rouge, LA; Charlotte, NC; Houston, TX; and Florida offices in Tampa, Merritt Island, Fort Myers, North Port, and Jupiter. Our qualified team of approximately 620 construction specialists consists of construction manager, project estimators, superintendents, engineers, craftsmen, and technical personnel. With a focus on building communities, we specialize in hospitality, water treatment, municipal, education, sports, and entertainment projects—all the things a community needs to thrive.

We take tremendous pride in what we build and are committed to delivering superior services to our clients. Our services cover the full range of the construction process from preconstruction to project close-out. Whether the project is hard bid, construction management, general contracting, or design-build, we have the in-house expertise to ensure our clients' needs are always met.

A company's character is revealed in what it does. At Wharton-Smith, strong core values are just as important as business acumen and operations skills. Wharton-Smith was built on a clear set of core values that hold true today—honesty, integrity, trust, fairness, and quality. These values are instilled in the people we hire and the projects we build. Making a positive difference in the lives of our clients, our employees, and those in the communities where we live, work, and play is the Wharton-Smith Way. Improving the quality of life wherever we do business is part of our heritage and culture, and is an indispensable part of achieving our vision—**to be the Construction Group of Choice.**

OUR VISION... to be the construction group of choice for our employees, our clients, and the communities we serve.

OUR MISSION... to exceed our clients' expectations by performing with the highest quality professionalism and fairness and by communicating with honesty and integrity at all times.

GRAND PALMS ASSISTED LIVING FACILITY

Orlando, Florida



SIZE

45,000 SF

COMPLETION

June 2013

COST

\$5.8 M

REFERENCE

Contact: Brian Fuhrmeister
Ph: (941) 780-3581
bfuhrmeister@gmail.com

New construction of a single-story, 45,000 SF Assisted Living and Memory Care facility in Orlando, FL. The property contained a substantial amount of wetlands, which required mitigation and preservation of remaining undisturbed areas. The structure is comprised of a post-tension slab on grade, wood framing, roof trusses, and metal rod tie-down system. Project amenities include three exterior courtyards, ice cream parlor, hair salon, country kitchens, card rooms, and greenhouses in each wing of the building.

Wharton-Smith key team members, Johnathan Wilkes, Project Executive, and Kevin Spicer, Superintendent, worked on this project while employed with a previous firm.

RELEVANT EXPERIENCE

GRAND OAKS OF JENSEN BEACH

Jensen Beach, Florida



SIZE

80,000 SF

COMPLETION

November 2014

COST

\$8.7 M

REFERENCE

Visiting Nurses Association
Contact: Jeb Acuff
Ph: (772) 286-1844

New construction of a two-story, 80,000 SF Assisted Living and Memory Care Facility in Jensen Beach, FL. It's structure included load bearing CMU, Hollow Core Planks and Wood Roof Trusses. The exterior façade was Key West-inspired with bright colors and tropical landscaping spanning the four-acre site. Amenities included a large dining area, hair salon, spa, country kitchens, and interior courtyards with outdoor cooking and entertaining space.

Wharton-Smith key team members, Johnathan Wilkes, Project Executive, and David Romero, Project Manager, worked on this project while employed with a previous firm.

RELEVANT EXPERIENCE



BEACH HOUSE ASSISTED LIVING FACILITY

Jacksonville Beach, Florida

SIZE
90,000 SF

COMPLETION
January 2015

COST
\$9.8 M

REFERENCE
Prevarian Senior Living
Contact: Scott Walker
Ph: (214) 736-7000

New construction of a three-story, 90,000 SF Assisted Living and Memory Care Facility in Jacksonville Beach, FL. The property was located within a small residential community with limited land available. Stormwater runoff was collected and stored in subsurface rain tanks below the parking lots. Portions of the second- and third-story cantilevered over the first floor to provide additional square footage to the building as well.

The structure primarily consisted of load bearing CMU/ hollow core plank intermixed with the cantilever CIP concrete decks and a tie-column/beam system. The interior space of the building included large open common rooms for games/crafts, hair salon, chapel, and country kitchens.

Wharton-Smith key team members, Johnathan Wilkes, Project Executive, Kevin Spicer, Superintendent, and David Romero, Project Manager, worked on this project while employed with a previous firm.

RELEVANT EXPERIENCE



SUMMER VISTA ASSISTED LIVING FACILITY

Pensacola, Florida

SIZE

110,000 SF

COMPLETION

January 2016

COST

\$10.8 M

REFERENCE

Hardcourt Development, LLC
Contact: Alan Wood
Ph: (850) 293-0443

New construction of a three-story, 110,000 SF Assisted Living and Memory Care Facility in Pensacola, FL. Nestled in a resident neighborhood near the Pensacola Beaches, the Summer Vista Assisted Living Facility included the construction of a storm retention pond, a nature trail to the rear of the project site, and two interior courtyards with a water fountain feature and a fireplace.

The building structure was constructed with CMU Masonry exterior and load bearing walls that carried a precast concrete hollow core deck and a pre-engineered wood truss roofing system. The interior space of the facility included community kitchens, large open spaces for activities, a spa/salon, and a fitness/wellness center.

Wharton-Smith key team members Kevin Spicer, Superintendent, and David Romero, Project Manager, worked on this project while employed with a previous firm.

LAKE HOUSE AT EUSTIS ASSISTED LIVING FACILITY

Lake Eustis, Florida



SIZE

87,166 SF

COMPLETION

July 2022

COST

\$16 M

REFERENCE

Northshore Development
Group, LLC
Contact: Greg Bond
Ph: (407) 801-4323

Wharton-Smith's Space Coast division is providing new construction for Northshore Development Group, LLC on the Lake House at Eustis Assisted Living Facility. This will be a 87,166-square-foot, 98-unit, three-story project. Development will begin with the demolition of three existing structures and several accessory structures on a 1.75-acre site. Once the project begins in June 2021, the team will be working alongside Bessolo Design Group and is expected to be completed in July of 2022.

RELEVANT EXPERIENCE



BRIDGEWATER ASSISTED LIVING MIDTOWN

Phoenix, Arizona

SIZE

126,000 SF

COMPLETION

2019

COST

\$22.4 M

REFERENCE

Solterra Senior Living
Contact: Steve Jorgenson
Ph: (602) 840-0937

Solterra BridgeWater MidTown is a 115,600 SF, seven-story, 164-bed low-income assisted living facility including 36 memory care units (32 single/4 double) with amenities.

Wharton-Smith key team member Bryan Bernardo, Project Executive, worked on this project while employed with a previous firm.

RELEVANT EXPERIENCE



HACIENDA AT THE CANYON

Tucson, Arizona

SIZE

285,362 SF

COMPLETION

2018

COST

\$53 M

REFERENCE

The Freshwater Group/
Watermark Retirement
Communities

Contact: Jim Goebel

Ph: (520) 297-9800

The Hacienda at the Canyon offers Independent Living, Assisted Living and Memory Care. The project entails several “communities within a community.” One community is comprised of residents of the casita homes, targeted to younger retirees. Casita residents have access to all common areas of the community, including the dining venues in the Independent Living common and the wellness center and its dining venue, and other common areas.

The Independent Living accommodations are configured in three-story buildings radiating from a common area building. The residences include one and two bedroom apartments ranging in size from approximately 800 SF to over 1,300 SF. The Assisted Living neighborhood provides studio and one-bedroom accommodations for residents and include a dining room, activity rooms, library, crafts room, and a small home theater. One large home, designed to accommodate approximately 36 residents, houses the program for residents requiring Memory Care.

Wharton-Smith key team member Bryan Bernardo, Project Executive, worked on this project while employed with a previous firm.

RELEVANT EXPERIENCE

ORCHARD POINTE AT TERRAZZA

Peoria, Arizona



SIZE

135,383 SF

COMPLETION

2019

COST

\$18.5 M

REFERENCE

Orchard Pointe at Terrazza LLC

Contact: Farhan Khan

Ph: (402) 933-2564

This retirement community offers independent living, Assisted Living and memory support and will provide residents with 24/7 complex nursing care. Floor plans feature 10-foot ceilings. The 135,383 SF project consists of 116 apartments including 40 independent living, 54 Assisted Living and 22 Memory Care units.

Wharton-Smith key team member Bryan Bernardo, Project Executive, worked on this project while employed with a previous firm.

RELEVANT EXPERIENCE

Wharton-Smith's Commercial Division is made up of seasoned construction professionals who bring a depth of experience in a variety of commercial project types—from senior living, assisted living, and skilled nursing care to high-end hotels and vacation resorts, mixed-use developments, and high-rise office buildings. It is the experience that our individual team members bring to every project that provide us with the expertise and utmost attention to quality and detail. In addition to the senior living projects highlighted on the previous pages, the following represents a select list of relevant projects completed by Wharton-Smith team members.

ADDITIONAL SENIOR LIVING PROJECTS

- Hacienda at the Canyon, Tuscon, AZ
- Maravilla Senior Living, Scottsdale, AZ
- McKeen Towers, West Palm Beach, FL
- Sagewood Senior Living, Phoenix, AZ
- Sandhill Cove Phase II, Palm City, FL
- La Casa Grande Skilled Nursing Care Center, Englewood, FL
- Bishop Grady Villas Multi Living Retirement Center, St. Cloud, FL
- Manorhouse Assisted Living Facility, Chattanooga, TN
- Claiborne County Nursing Home, Tazewell, TN
- Water's Edge of Bradenton Assisted Living Facility, Bradenton, FL
- Water's Edge of Lake Wales Assisted Living Villas, Lake Wales, FL
- Bentley Commons Senior Independent Living, Zephyrhills, FL
- Kissimmee Good Samaritan Village Independent/Assisted Living, Kissimmee, FL
- Villas at Lake Pointe Woods Independent Senior Villas, Sarasota, FL
- Port Charlotte Rehabilitation Center, Port Charlotte, FL
- Spring Lake Nursing & Rehabilitation Center, Winter Haven, FL
- Melbourne Terrace Rehabilitation Center, Melbourne, FL
- Centre Pointe Health & Rehab Center, Tallahassee, FL
- Village Park Senior Living Apartments, Winter Park, FL
- Clarity Pointe Coconut Creek, Coconut Creek, FL
- Clarity Pointe Stuart, Stuart, FL



RELEVANT EXPERIENCE

HOSPITALITY PROJECTS

- Bella Colina, Monteverde, FL
- John's Island Beach Club, Vero Beach, FL
- Marriott Residence Inn Mayo, Phoenix, AZ
- The Bear's Club, Jupiter, FL
- Westin St. John Resort, Virgin Islands
- Pond Bay Club, Virgin Islands
- Centennial Plaza Holiday Inn Resort, Gulfport, MS
- Sheraton Hotel Renovation, Indianapolis, IN
- Reunion Resort and Water Park
- Gaylord Palms Resort and Convention Center
- Hard Rock Resort Casino
- Mixed-Use, High-End Retail, Hotel and Water Park, American Dream Development, Rutherford, NJ
- Aloft Hotel, Orlando, FL
- Streamsong Resort, FL
- Biltmore Winery Antler Village, Asheville, NC
- 55 West, Orlando, FL
- Hardrock Tampa Hotel & Casino, Tampa, FL
- Hilton Ruby Lake Resort Orlando, FL
- The Vue at Lake Eola, Orlando, FL
- Disney Polynesian Resort Rehab, Lake Buena Vista, FL
- Ritz Carlton Golf Lodge, Naples, FL
- Disney's Coronado Springs Resort and Convention Center, Kissimmee, FL
- Disney's Florida Resort, Vero Beach, FL
- Disney's Beach Club Villas, Lake Buena Vista, FL
- Mansion on Forsyth Park, Savannah, GA
- Marriott Ocean Palms, Rivera Beach, FL
- Sheraton Lake Buena Vista Resort, Orlando, FL
- Marriott Harbor Lake, Orlando, FL
- Marriott Springhill Suites/Lake Buena Vista in Marriott Village, Orlando, FL
- Comfort Inn & Suites, Palm Bay, FL
- Grand Floridian Renovation, Walt Disney World
- Polynesian Resort Concierge Lounge Addition, Walt Disney World



KEY TEAM MEMBERS



BRYAN BERNARDO, LEED AP

Project Executive

Bryan is a seasoned construction professional with vast experience in the senior living, hospitality, and commercial markets. As a Project Executive, Bryan works to ensure the entire team is on the same page regarding the project and fosters a one-team atmosphere. He provides guidance and problem solving advice, assists with staffing, outlining project plans, setting project goals/deadlines, and evaluates performance. He also works closely with our Preconstruction Services Managers on bid packages, schedule, constructability reviews, value engineering, and site logistics.

Bryan's relevant experience in the senior living and hospitality markets includes:

- Beatitudes Senior Living, Phoenix, AZ (\$65 million)
- Cadence Chandler, Chandler, AZ (\$35 million)
- Hacienda at the Canyon, Tuscon, AZ (\$57 million)
- Homewood Residence, Coral Springs, FL (\$10 million)
- Maravilla Senior Living, Scottsdale, AZ (\$65 million)
- McCarty on Monroe Senior Living, Phoenix, AZ (\$20 million)
- McKeen Towers, West Palm Beach, FL (\$50 million)
- Orchard Pointe, Peoria, AZ (\$19 million)
- Sagewood Senior Living, Phoenix, AZ (\$175 million)
- Sandhill Cove Phase II, Palm City, FL (\$40 million)
- Solterra Avondale, Avondale, AZ (\$22 million)
- Solterra Midtown, Phoenix, AZ (\$22 million)
- Sundance Senior Care, Buckeye, AZ (\$42 million)
- Texas State Veteran's Home, Houston, TX (\$37 million)
- The Center at Grande, Tyler, TX (\$20 million)
- Village on the Green Phase II, Longwood, FL (\$25 million)

EDUCATION

BS, Building Construction,
University of Florida

REGISTRATIONS/ LICENSES/ CERTIFICATIONS

California A General
Engineering Contractor

California B General
Building Contractor

Florida Certified General
Contractor

Nevada AB General
Building and General
Engineering Contractor

New Mexico General
Building Contractor
GB98

LEED Accredited
Professional

KEY TEAM MEMBERS



JOHNATHAN WILKES, LEED AP

Project Executive

Johnathan brings extensive experience in the construction industry as an engineer, field operations manager, estimator, and project manager for multi-million dollar projects in the senior living and commercial market sectors. As a Project Executive, Johnathan works to ensure the entire team is on the same page regarding the project and fosters a one-team atmosphere. He provides guidance and problem solving advice, assists with staffing, outlining project plans, setting project goals/deadlines, and evaluates performance. He also works closely with our preconstruction services managers on bid packages, schedule, constructability reviews, value engineering, and site logistics.

Johnathan's relevant experience in the senior living market includes:

- Silver Creek Senior Care Facility, Zerga Companies, St. Augustine, FL (\$18.6 million)
- Grand Oaks of Jensen, Visiting Nurses Association, Jensen Beach, FL (\$8.7 million)
- Beach House Assisted Living Facility and Memory Care Prevarian Senior Living, Jacksonville Beach, FL (\$9.8 million)
- Hillel Faith Center, Central Florida Hillel, Orlando, FL (\$2.1 million)
- Grand Palms Assisted Living Facility and Memory Care, Parkwood Properties, Orlando, FL (\$5.8 million)
- Spring Lake Rehab, Clear Choice Health Care, Winter Haven, FL (\$6 million)
- Highlands Nursing and Rehab Center, Synergy Healthcare Services, Louisville, KY (\$2.6 million)

EDUCATION

BS, Building Construction,
University of Florida

REGISTRATIONS/ LICENSES/ CERTIFICATIONS

LEED Accredited
Professional



DAVID ROMERO, EIT

Project Manager

As Project Manager, David is responsible for providing daily leadership to the project team and for the successful completion of all preconstruction and construction phases of the project. He will develop schedules, perform constructability reviews, value engineering and site logistics. During construction, he assists with all construction activities, including quality control, cost control, change orders, and close-out.

David's select experience includes:

- Beach House Assisted Living Facility and Memory Care Prevarian Senior Living, Jacksonville Beach, FL (\$9.8 million)
- Grand Oaks Assisted Living Facility, Duval County, FL (\$8.7 million)
- Summer Vista Assisted Living Facility, Escambia County, FL (\$10.8 million)

EDUCATION

BS, Civil Engineering,
University of Central
Florida

BS, Construction
Engineering, University of
Central Florida

KEY TEAM MEMBERS



CORY MCBRIARTY, EI

Project Manager

As Project Manager, Cory is responsible for providing daily leadership to the project team and for the successful completion of all preconstruction and construction phases of the project. He will develop schedules, perform constructability reviews, value engineering, and site logistics. During construction, he assists with all construction activities, including quality control, cost control, change orders, and close-out.

Cory's relevant experience in the senior living / hospitality market includes:

- Cobblestone Place ALF New Construction Assisted Living & Memory Care, Boca Raton, FL (\$23 million)
- Port Charlotte Rehabilitation Center Renovation/Addition Skilled Nursing & Rehab, Port Charlotte, FL (\$6.2 million)
- Spring Lake Rehabilitation Center Renovation/Addition Skilled Nursing & Rehab, Winter Haven, FL (\$5.3 million)
- Melbourne Terrace Rehabilitation Center Renovation/Addition Skilled Nursing & Rehab, Melbourne, FL (\$5.1 million)

EDUCATION

BS, Civil Engineering,
University of Central
Florida

REGISTRATIONS/ LICENSES/ CERTIFICATIONS

Registered Engineering
Intern, State of Florida
OSHA-10 Hour



KEVIN SPICER, LEED GA

Project Superintendent

Kevin has worked in the construction industry for over 40 years and brings vast experience as a project superintendent on senior living, hospitality and commercial projects. As Superintendent, he is responsible for the successful completion of all field activities, including overall leadership for onsite field administration, technical management of all construction operations, and supervision of assistants, foremen, subcontractors, and other construction related personnel.

Kevin's relevant experience in the senior living/hospitality market includes:

- Beach House Assisted Living Facility and Memory Care Prevarian Senior Living, Jacksonville Beach, FL (\$9.8 million)
- Summer Vista Assisted Living Facility, Pensacola, FL (\$10.8 million)
- Grand Palms Assisted Living and Memory Care Facility, Orlando, FL (\$5.8 million)
- LaColonado Condominiums, Orlando, FL
- Hillel Faith Center, Central Florida Hillel, Orlando, FL (\$2.1 million)

EDUCATION

BS, Construction
Technology, Murray State
University

REGISTRATIONS/ LICENSES/ CERTIFICATIONS

LEED Associate, GBCI
EPA Stormwater
Management Inspector
OSHA 30/First Aid/CPR
DOT/MOT

KEY TEAM MEMBERS



PAUL FULKS, P.E., GGP

Senior Preconstruction Manager

Paul is a seasoned construction professional with vast experience in the senior living, hospitality, and commercial markets. As Sr. Preconstruction Services Manager, Paul organizes the estimating process, local and minority subcontractor solicitation, bid day assignments, and the coordination of other team members within the Preconstruction Department. He also reviews contract documents, performs a detailed estimate, and prepares the preliminary pricing and final Guaranteed Maximum Price (GMP).

Paul's relevant experience in the senior living and hospitality markets includes:

- Manorhouse Assisted Living Facility, Chattanooga, TN (\$5.6 million)
- Manorhouse Assisted Living Facility, Knoxville, TN (\$5.4 million)
- Claiborne County Nursing Home, Tazewell, TN (\$2.5 million)
- Tideland on the Intercoast Multi-Family Resort Development, Palm Coast, FL (\$193 million)
- Cinnamon Beach Condominiums, Palm Coast, FL (\$172 million)

EDUCATION

BS, Civil Engineering,
University of Tennessee

REGISTRATIONS/ LICENSES/ CERTIFICATIONS

State of Florida
Professional Engineer
State of Florida Certified
General Contractor
Green Globes Professional



KEVIN BRADFORD

Preconstruction Manager

Kevin provides estimating services in Wharton-Smith's Commercial Division Preconstruction Department. His responsibilities include the review of contract documents, estimating, the preliminary pricing of projects, and assisting in the preparation of Guaranteed Maximum Price (GMP) packages.

Kevin's relevant experience in the senior living/hospitality market includes:

- Clarity Pointe Memory Care Facility, Olsen Land Partners, Coconut Creek, FL (\$13.1 million)
- Clarity Pointe Memory Care Facility, Olsen Land Partners, Stuart, FL (\$12.6 million)
- Brananfields Rehabilitation Center Skilled Nursing Facility, Health Care Managers Inc., Jacksonville FL (\$21.9 million)
- Parc Hill Assisted Living and Memory Care Facility, Civitas, Orange City, FL (\$10.6 million)
- Cross Park Assisted Living and Memory Care Facility, Cross Park Partners, Lutz, FL (\$35.7 million)
- North Palm Beach Commons Assisted Living and Memory Care Facility (Site Work), Urban Design Kilday Studios, North Palm Beach, FL (\$1.2 million)
- Solera Senior Apartments, Solera Senior Living, Tampa, FL (\$4.5 million)

EDUCATION

BS, Civil Engineering,
University of Central
Florida, 2017

AA, Lake Sumter State
College, 2014

OSHA 30/First Aid/CPR
DOT/MOT



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CONSTRUCTION GROUP