



Association of Ontario Land Surveyors

Manual of Business Communication
For Surveyors

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Terms of Use

This manual is intended to be a “Living Document” in that revisions may be made from time to time due to necessity and/or content addition or improvement. The Association of Ontario Land Surveyors welcomes its members to use this document for their own purposes, subject, but not limited to the following terms and conditions:

The information in this business communication manual is provided for general reference only on an “as is” basis, and should not be relied upon without verification and/or confirmation. The AOLS and/or authors of this document shall not be held liable for any damages however caused resulting from the use of this manual. No information in this manual can be used as a substitution for proper legal opinion.



Estimates/Contracts/Letters of Confirmation

It is the surveyor's responsibility to explain the scope of work and the nature of fees for every project. Under Section 3 of Regulation 216/10¹, "*A professional member who undertakes a project for a client shall review the proposed project with the client to describe how the project shall be undertaken so that it complies with all applicable Acts, regulations under them and practice standards*". Providing the client with this information in writing allows the client to confirm their understanding of the work that will be done, and to correct any misunderstandings before the project begins. By requiring the client to acknowledge the project terms in writing, both the client and the surveyor are committing to the project and terms.

A simple letter of confirmation provides the documentation needed for peace of mind for all parties. Sample Letters of Confirmation for various types of surveys are included in this manual and are available in Word format on the AOLS website. More complex survey projects may require a more in-depth contract - input from a lawyer may be advisable.

Every letter of confirmation² should include these elements:

- The date
- The name and address of the company/individual(s) requiring the work
- The name and address of the company/individual(s) requesting the work (if different from above)
- The type of survey being requested
- The legal description of the property to be surveyed
- A list of the work to be done, including all deliverables
- Any required approvals
- Timelines for completion of the work
- Your fees, disbursements, taxes, and any additional costs not to be covered by you
- The terms of payment: retainer, balance due date, interest charges, document hold-back or work stoppages for non-payment, etc.
- Limitations to the project - weather and other potential delays, estimate expiry date, etc.³
- Details for potential changes to scope of work after the project is approved⁴
- Surveyor's signature
- Signature of individual(s) or person with authority to bind the company - to authorize the survey and terms of payment
- Signature of the registered owner of the property to authorize the survey (if different from above)

Do not be pressured into agreeing to timelines you can't meet, prices that are below a reasonable fee, or work you are not comfortable with. At no time should a surveyor agree to do

¹ Ontario Regulation 216/10 *Performance Standards for the Practice of Professional Land Surveying*

² See Appendix A for Sample Letters of Confirmation

³ See Warnings, Caveats, and Limitations to Estimates in this manual

⁴ See Change Orders section of this manual



work that could void their insurance coverage, that is beyond the surveyor's expertise, is illegal, or that contravenes the AOLSA Code of Ethics.



Warnings, Caveats, and Limitations to Estimates

Although it is not possible to predict every potential problem or assumptions being made, it is important to try to anticipate them, and make your client aware of the limitations, to avoid surprises and possible liability.

Here are some examples of limitations that you may wish to include in your letter of confirmation. This list is not exhaustive - consider if your project has other potential pitfalls to warn your client of.

- No digital information will be made available without a signed Cad Disclaimer Form⁵
- Estimate is based on snow free (or leaf free) conditions.
- Survey bars must not be tampered with between phases of the project
- Approvals from municipalities, purchasers, clients, other professionals, etc. may delay completion date. We cannot guarantee the timelines if there are delays due to others.
- Availability of Locate companies may delay completion date. All fees for underground locates are extra.
- This estimate is for field work only - no plan or sketch is included. A plan can be prepared for additional fees.
- This estimate expires on (insert date).
- The field work is not to be considered final until you have received written confirmation from the Ontario Land Surveyor.
- The buildings being constructed will not be tied in until the foundations have been back-filled.
- This estimate is based on Drawing No. X, Version X, by Company Y, attached to your email dated...
- For our mutual protection, the building will be laid out from the most up-to-date drawings provided by you, and must have your signature and date on every page.
- The project will be invoiced when the plan is completed, prior to depositing the plan.
- Interim invoices will be submitted monthly and are due within 15 days of the date of invoice.
- The surveyor reserves the right to stop all work and withhold any deliverables due to non-payment of fees, and will not be held responsible for any resulting delays due to non-payment of fees.
- Any changes or additions to the survey must be requested in writing and may be subject to additional fees. Please be advised that the field staff are not authorized to accept any change orders on behalf of (insert your company name here).⁶
- No guarantee is made that a particular monument can be set at the exact corner of the lot or parcel.
- Please ensure that the scope of work as outlined above encompasses all the requirements of the municipality and other approval authorities for your project.

⁵ See sample Cad Disclaimer form in this manual

⁶ See Change Orders in this manual.



Change Orders

Changes to the initial project requirements must be dealt with cautiously. Seemingly simple and easy changes can have unintended, expensive results if the changes are not carefully approved, checked, and documented.

The client must be made aware, before the project is started⁷, that any changes or additions to the project must be received in writing, and are subject to additional fees.

Ensure that all staff, especially field staff, are regularly reminded that all changes or additions to the agreed-on scope of work must first be approved by the licensed surveyor. A “favour” to the client or on-site contractor helps no one if the result is a misplaced building, insurance claims, or unanticipated fees.

ENCON has prepared the following checklist for change orders:

- Construction contracts should contain provisions for preparing and executing documentation related to changes.
- Use standard change order forms.
- Use the same care in preparing change orders as was taken in preparing the original documents.
- If the time needed to respond to changes affects construction scheduling, inform the contractor and client immediately.
- Communicate all changes and the reasons for them to the contractor and affected sub consultants.
- Do not act on any change orders until the client approves them in writing.
- Document all telephone calls about changes.
- File correspondence so it remains accessible.

⁷ See Estimates, Contracts, and Letters of Confirmation in this manual.



Project Close Reports

At the conclusion of the project, we are required under Section 4 of Regulation 216/10⁸ to provide a report to the client. A written report provides documentation that can be referred to in the future, should any questions or conflicts arise.

A final report need not be long or complicated, but it should include the following elements:

- A description of the work that was done - the scope of work in the initial letter of confirmation should be reiterated.
- If any of your work or deliverables relied on data from other sources, these sources should be noted (eg. all sewers shown on the plan are based on Municipality X's Drawing No. Y, dated...).
- A description of any work that could not be done, and why - this should be a reiteration of your written communication with the client at the time the issue was discovered (include the date(s) of your communication).
- A reminder of any responsibilities of the client (eg - use both benchmarks in case one gets disturbed, protect survey bars for Phase 2 work, etc.).
- A description of any work that resulted from requested changes - this should be a reiteration of your written communication with the client at the time this change was requested (include the date(s) of your communication).
- Any approvals that were received, for what, by whom, and when they were received.
- A description of your findings, including easements, encroachments, etc.
- Any recommendations you may have.
- A description of the status of the deliverables (ie what has been sent to whom, and in what format).
- A reference to your invoice⁹, and the balance owing.
- Whom they may contact if they have any questions or concerns.

⁸ Ontario Regulation 216/10 *Performance Standards for the Practice of Professional Land Surveying*

⁹ See Invoices in this manual.



Invoices

It is the surveyor's responsibility to ensure the client is aware of the nature of all fees charged. It is important to provide a written report to the client, which provides documentation that can be referred to in the future, should any questions or conflicts arise.

Invoices need not be long or complicated, but should include the following elements:

- The date.
- The name and address of the company/individual(s) who required the work.
- The name and address of the company/individual(s) who requested the work (if different from above).
- The legal description of the property that was surveyed.
- Surveyor's file number.
- The type of survey that was done.
- A description of the work that was done, including all deliverables (should be a reiteration of the scope of work in the initial letter of confirmation) and fees for that work.
- A description of any work that resulted from requested changes; should be a reiteration of your written communication with the client at the time this change was requested (include the date(s) of your communication) and fees for the additional work.
- A description of the disbursements and the amount owing for them.
- Taxes owing.
- Terms of payment (eg. Net 15 days) (should be a reiteration of the terms of payment in the initial letter of confirmation).



Staff and Communication

Texting

Texting and other forms of messaging have become a regular means of communication. Here are some things to consider when using this form of communication with staff and colleagues.

- Text messages may give the impression that what's being conveyed is not important. If you plan to make this a regular means of communicating, make sure all staff understand the significance of receiving work related texts.
- Make sure the information in the text is conveyed to everyone on the work team.
- Consider a follow-up email, possibly including the entire work team. This will ensure everyone has all the same information. It also leaves a digital paper trail for both sender and recipient that becomes part of the documentation for that project. In the event of a legal situation, you don't want the only record of instructions or results to be on a personal phone.

Safety

All staff need to be regularly trained and updated on safety measures for their position and working conditions. Staff should be trained on your company's preferred format for recording daily safety measures, "close call" incidents and accident reports.

Accepting Change Orders¹⁰

Staff should be trained on your company's preferred format for recording instructions and communications with the client and other parties involved in the project (phone logs, job order sheets, change order forms, etc.)

All staff need to be regularly reminded that any instructions or changes from the client or others need to be clearly documented and brought to the attention of the licenced surveyor immediately.

Dealing with the Public

All staff should be aware that they represent you and the company in all their dealings with the public. Their manner of speech should be professional, and client confidentiality must be preserved in all discussions with neighbours and other interested parties.

Field staff should identify themselves to the client, renters, and abutting owners/renters, both in person, and with the use of vehicle signage, business cards of the supervising OLS, and AOLS door hangers. When discussing the reason for the survey with neighbours, field staff must be careful not to disclose any information that might be considered a breach of client confidentiality.

¹⁰ See Change Orders in this manual.



Complaints and Complications

Dealing with Complaints

If you are faced with an unhappy client or neighbour, care must be taken to respond patiently, politely, and professionally, regardless of the manner of the complainant or the apparent legitimacy of the complaint. Engage in active listening, maintain your composure, and make sure you understand the issues. If the discussion becomes heated, or if you need to consider the situation, you may choose to offer to look into the matter and get back to them in a day or two.

Do not ignore complaints. It is your professional responsibility to answer for your work. Although it is important not to jeopardize your insurance coverage by admitting guilt, a response is required. A telephone call is often appreciated (as opposed to an email), and allows the complainant to be heard, and also ensures that the tone of your response is not misunderstood. A follow-up email should then be considered, to reiterate your understanding of the issues, and any conclusions that were reached.

Make notes for your file of any complaints or discussions, and retain all documentation. Good documentation will save time if the complaint escalates and involves the AOLS, your insurance company, or the courts.

Insurance Issues

If you feel there may be the possibility of a claim to your insurance company, however remote, **contact them immediately**. Failing to notify your insurer may void your coverage. They will advise you on the best way to proceed.

Do not offer any monetary solutions or admit to being the source of a problem without consulting your insurer.



Sharing Your Digital Data

A client will often require a digital version of your plan as part of the deliverables. It is understood that the purpose of the digital drawing is for the client to share with other professionals involved in their project. It is important that all users are aware of the limitations of the digital drawing, and also that no one relies on an out-dated drawing, years from now, once the current project has been completed.

It is recommended that you have the client and other professionals involved in their project sign a Digital Disclaimer Form before you release the digital plan to them. The Disclaimer Form serves 2 purposes:

1. To put everyone who uses the digital drawing on notice that once other people have accessed the drawing, they are able to make changes that the surveyor has no knowledge of, or control over. Also, the nature of the drafting means that some of the lines depicted may not show the correct dimensions if clicked on by a mouse. For example, to show survey bars as hollow, some of the linework may have been cut. The Disclaimer Form alerts users to these possibilities, for their own protection, as well as the surveyors'.
2. To restrict the use of the plan by parties *unrelated to the current transaction*, at some time in the unknown future. All parties related to this project who will be using this digital drawing, such as the architect, should be signing the Disclaimer Form.

Digital Plan (CAD file) Release Considerations

Purpose

The following document was prepared by the Digital Plans Task Force and is intended to provide survey firms with items to consider when they seek legal advice in drafting contracts for releasing digital plans, particularly CAD files. This document does not address digital submissions to the Land Registry System. This is not intended as any form of legal advice and serves as recommendations for consideration only. Any use of this information is at the user's discretion and the Association of Ontario Land Surveyors or its committees and task forces take no responsibility or liability for its usage. It is up to survey firms to get their own legal advice and draft their own legal agreements.

Process

The Digital Plans Task Force sent out a request to approximately 10 firms, ranging from small to large, seeking information on practices associated with releasing CAD files. The returns were reviewed and amalgamated. The summary document was reviewed and debated by the Digital Plans Task Force, which has resulted in this document.

Observed Differences

The type of coordinates provided by survey firms vary with some providing grid coordinates and others providing assumed ground values. There is not a best practice



forthcoming in this area, however it is essential to describe the coordinate system provided.

Covering letters and agreement practices varied significantly from very formal agreements to little in the way of direction to the client. Best practices in this regard are identified below.

The practice of layering in CAD files differed by firm and even by client within firms. Calculation layers were often omitted from the product provided to the client.

Overarching comments

CAD files are subject to copyright and as such the survey firm controls their usage and dissemination. Although there appeared to be some appetite to make use of digital signatures, in practicality no one surveyed was using them and they were seen as limiting the usage of the document. As a result, contractual mechanisms should be implemented as best practices to address integrity issues as identified below.

Best Practices

Release of CAD Files

CAD files should only be released to direct clients and government organizations as required. Where CAD files are to be released to third parties on behalf of the client, this should form part of a contract which should address liability and usage.

Covering Letter/Agreements

It is important that the release of any CAD files is accompanied by a transmittal document and agreement. This is important to ensure that the client understands the content and limitations of the product to limit liability of the surveyor. Some organizations combine the cover letter and agreement, which is also an acceptable best practice. CAD files should not be released until the legal agreement has been executed.

Transmittal Documents

Transmittal Documents can supplement information contained in the file including information about the file including file type, date, purpose the file is being provided for, coordinate type with reference system information, and if appropriate, to introduce the agreement that is included.

Where coordinates are provided in a map projection, the scale factor should be included to allow the user to convert to ground dimensions.

Legal Agreement

It is imperative that legal agreements form part of the release of CAD files. As noted above they add to clarity in the transaction and help protect the survey firm. The agreement should be accepted by the client prior to releasing the CAD file.



The following items should be included in the legal agreement (this represent concepts only and actual wording is up to the user):

- CAD files were not prepared specifically for the recipient and are provided for convenience and do not replace the hard copy sealed plan which governs; in the event of any conflict the hard copy plan governs;
- The recipient bears the risk with using the CAD file and the survey company is not liable for any usage of the CAD file;
- Ownership and copyright of the CAD file and its content remains with the survey firm and is not transferred to the recipient;
- The precision of the coordinates contained in the CAD files is a function of the scale, software and processes used in creating the CAD file, and is not an indication of the accuracy of the coordinates;
- The CAD file may be updated by the survey firm and the update may not be provided to the recipient;
- The recipient bears responsibility for any change they make to the CAD file and will indemnify and save harmless the survey firm for any damage, cost, or liability resulting from changes made;
- While reasonable care has been used to ensure that the transfer medium and the material are free of computer viruses, the survey firm accepts no responsibility in this regard; and
- Passing on the file to any other organization should only be done if in accordance with the purpose of the plan described and all recipients of the file agree to be bound by the provisions above and to not pass on the file on any further. Your lawyer should advise you of specific provisions related to downstream and third-party users.



Appendix A - Sample Letters of Confirmation

The following documents can be copied and amended for use in your company.



Construction Layout #1

DATE
CLIENT, Project Coordinator
ABC Construction Management Inc
client@ABC.com

Re: Mall – Washroom Layout

Further to your request for quotation, this letter outlines the scope of our involvement in your project and the fees associated with our services.

Terms of Reference and Scope of Work

The scope of work will be to provide layout for the location of the new walls for the washroom in the Renovation Phase 1 project. We will mark the location of the walls as per the plans provided and leave any offset marks requested on site.

ABC Construction Management Inc agrees to provide the PDF copy of the plan, and a CAD file if available, a minimum of **five** days prior to the survey.

Perfect Geomatics will approve the locations staked for construction within **one** day of completion of the field survey. This time will be used to obtain the field notes and data, examine the survey data and correct any deficiencies discovered.

ABC Construction Management Inc agrees that if construction takes place prior to Perfect Geomatics reviewing the data and approving the locations staked, Perfect Geomatics and its employees shall not be held responsible for any errors or omissions that may occur either directly or indirectly as a result of the locations staked.

Perfect Geomatics will:

- Review the plans provided and pre-calculate the location of the walls to be staked.
- Survey the location of the existing walls to confirm the dimensions shown on the plans provided.
- Provide marks for the location of the face of the walls and any offset marks requested.
- Review the field data and provide ABC Construction with the approval of the marks within **one** day of completing the stakeout.

Deliverables:

- PDF copy of a sketch plan showing the location of the marks staked.

Work Schedule

Upon receipt of the plans we would start our pre-calculations of the locations of the walls. If additional information is required we would request it from ABC and won't be able to complete the pre-calculations until all information needed has been received.

We anticipate that the layout would take place during the week of DATE, and anticipate



completing the layout of the walls within one day.

Cost Estimate: Our fees for this project will be **\$X** plus applicable taxes. Any additional work beyond that specified in the Scope of Work must be requested directly through the Project Manager assigned to the project by Perfect Geomatics. Work carried out beyond that specified in the Scope of Work will be discussed with you prior to proceeding and a revised cost and scope of work will be prepared for your approval.

Payment Terms

By accepting this proposal you acknowledge and agree to the following terms of payment:

1. Progress invoices may be issued monthly and you agree to pay each invoice within 30 days of receipt.
2. Progress invoices will be based on the percentage of work completed.
3. Payment terms are net 30 days. Interest may be charged on any overdue amount at the rate of 2% per month (rate of 26.82% per annum).
4. If this contract for services is cancelled or terminated prior to completion you will pay for all work performed to the date of cancellation or termination on the basis of work completed and expenses.

Access to Work

You shall at all times have access to the work, which you may use to your benefit in accordance with the intended use as specified in the Scope of Work.

Liability

Perfect Geomatics will not be liable for any amounts whether arising in negligence or tort or other legal theory, (a) in excess of the total fees paid under this agreement, and (b) for any lost profits, lost revenues, lost business, failure to realize expected savings, or any other economic loss of any kind, or any special, indirect, consequential, special or punitive damages arising out of this agreement whether or not Perfect Geomatics was advised or aware of such potential loss.

PERFECT GEOMATICS LIMITED PARTNERSHIP,
by its general partner PERFECT GEOMATICS
GENERAL PARTNER CORPORATION

Signature: _____
Name of Surveyor, OLS

I accept the above noted terms and hereby authorize Perfect Geomatics to proceed with the layout survey.

Signature: _____ Date: _____

Printed Name: _____

Position: _____



Construction Layout #2

AGREEMENT

Client: _____

Address _____

City, Prov, Postal _____

phone _____

email _____

1. The Client hereby engages Perfect Geomatics LP, hereinafter called the "Surveyor" to provide its services at the date, place and occasion indicated below.
2. The Surveyor agrees to: (describe work to be done; place; and starting date)
3. The Client agrees to provide a certified hard copy and an AutoCAD copy of the architectural or engineering drawings showing the locations to be staked out. The drawings shall be received in our office a minimum of **five** business days prior to the field survey, to allow for the examination of the plans and to provide the field crews with proper instruction.
4. The Surveyor agrees to approve the locations staked for construction within **two** business days of completion of field survey. This time will be used to obtain the field notes, examine the survey data, and correct any deficiencies discovered.
5. The client agrees that if construction takes place prior to the Surveyor reviewing the data and approving the locations staked, the Surveyor and its employees shall not be held responsible for any errors or omissions that may occur either directly or indirectly as a result of the locations staked.
6. The client agrees to pay _____ on the date of completion to the Surveyor for truly and faithfully carrying out all the above mentioned terms and provisions.

All accounts are due and payable on notice of completion of the services and issuance of an invoice by Perfect Geomatics LP. Interest of 2% (rate of 26.82% per annum) will be charged on all overdue accounts.

I have read and agree to the terms and conditions of this agreement as stated above.

Signature of Client

Title

Date

Surveyor's Representative

Title

Date



Boundary Survey

(Date)

(Client name and address)

via email: (Client email address)

re: Boundary Survey of
PIN being
Part of Lot , Concession ,
Township of

Further to your request, I am confirming that you are retaining (*your company name*) to perform a boundary survey of the above property. We will perform a Registry Office search and locate and confirm the existing survey bars at your corners and replace any that are missing or disturbed.

Our estimate to perform this survey is \$, including disbursements for Registry Office fees, iron bars, wood stakes, and vehicle expenses, plus H.S.T.

We require payment of \$ prior to starting the work. We accept cash, cheques, or e-transfers to (*your email address*). If you require any changes or additions to the survey, we must receive the request in writing. Any changes or additions are subject to additional fees.

Please be advised that we are required under regulations of the Surveyors Act to interview your neighbours, where deemed necessary as part of our research. I assure you that we will not divulge any of your confidential information.

Please be advised also that this estimate is for field work only; there will be no plan or sketch prepared. Should you require a sketch or plan of this survey, we can prepare one for an additional fee.

This survey is not to be considered complete and final until a call or a written report from me is received. If you have any questions, please do not hesitate to call.

Yours truly,

(Your name)
Ontario Land Surveyor

Date

I, (*client name*), authorise the
above survey and terms.

Building Layout



(Date)

(Client name and address)

via email: (Client email address)

re: Building Layout of
PIN being
Lot , Concession ,
Township of

Further to your request, I am confirming that you are retaining (*your company name*) to perform a building layout for a storage building. We will offset the (*number of building corners*) corners two ways.

Our estimate to perform this survey is \$, plus \$ for disbursements for Registry Office fees, iron bars, wood stakes, and vehicle expenses, plus H.S.T.

We require full payment of \$ prior to starting the work. If you require any changes or additions to the survey, we must receive the request in writing. Any changes or additions are subject to additional fees.

Please be advised that we are required under regulations of the Surveyors Act to interview your neighbours, where deemed necessary as part of our research. I assure you that we will not divulge any of your confidential information.

Please be advised also that this estimate is for field work only; there will be no plan or sketch prepared. Should you require a sketch or plan of this survey, we can provide one for an additional fee.

This survey is not to be considered complete and final until a call or a written report from me is received.

If you have any questions, please do not hesitate to call.

Yours truly,

(Your name)

Ontario Land Surveyor

Date

I, (*client name*), authorise the above survey and terms.

Draft Plan of Subdivision



(Date)

(Client name and address)

via email: (Client email address)

re: Draft Plan of Subdivision
Lot , Concession ,
Township of

Further to your request we are confirming that you are retaining (*your company name*) to perform a Registry Office search and to prepare a Draft Plan of Subdivision for the above property.

Please note if we are required to obtain new elevations we will have to wait for bare ground in order to provide accurate measurements.

To create this Draft Plan of Subdivision the cost will be \$, plus \$ in disbursements (including approximately \$ for Registry Office fees), plus HST.

If you require any changes or additions to the survey, we must receive the request in writing. Any changes or additions are subject to additional fees.

Our invoice is to be paid upon completion of the work. Final copies will be forwarded to you upon receipt of payment. Interest of 2% (rate of 26.82% per annum) will be charged on all overdue accounts.

If you would like us to perform this work, please have the appropriate representative of (*their company name*) sign below and return this letter to us along with a retainer of \$

If you have any questions, please give us a call.

Yours truly,

(*Your name*)
Ontario Land Surveyor

Date

I, (*company representative name*),
have the authority to bind
(*company name*) and agree to
the above survey and terms.

Reference Plan



(Date)

(Client name and address)

via email: (Client email address)

re: Reference Plan of
PIN being
Lot , Concession ,
Township of

Further to your authorization we are confirming that you are retaining (*your company name*) to perform a Registry Office search and a field survey to prepare a reference plan for the above property.

Our estimate to perform this survey is \$, plus \$ for disbursements for Registry Office fees, iron bars, wood stakes, printing costs and vehicle expense, plus H.S.T.

If you require any changes (extra parts on the reference plan) or additions to the survey, we must receive the request in writing. Any changes or additions are subject to additional fees.

Upon completion of the work, we will provide you with a draft copy of the plan, together with our invoice. When we receive your approval and payment, we will deposit the plan in the Land Registry Office. Additional copies of the plan will be forwarded to you.

Our invoice is to be paid upon our completion of the survey, prior to depositing the plan. Interest of 2% (rate of 26.82% per annum) will be charged on all overdue accounts.

Please sign below and return this letter to us with your retainer of \$ to authorise us to perform this work. We accept cash, cheques, or e-transfers to (*your email address*). If you have any questions, please do not hesitate to call.

Yours truly,

(*Your name*)
Ontario Land Surveyor

Date

I, (*client name*), authorise the above survey and terms.



Site Plan

(Date)

(Client name and address)

via email: (Client email address)

re: Site Plan of
Lot , Concession
Geographic Township of
Township of

Further to your request, I am happy to confirm you are retaining (*your company name*) to provide a metric site plan of the above property. Our site plan will show:

(*list all anticipated features as discussed with your client*)

Example:

- *the westerly legal boundary*
- *elevations - ± 6 metre grid*
- *2 existing buildings*
- *deck, dock, water's edge, hydro poles*
- *2 benchmarks (set by us at the time of our field work)*
- *proposed dwelling*

As part of our work we will perform a Registry Office search and field work to verify the locations of your survey bars.

Our estimate to perform this survey is \$, plus \$ for disbursements for Registry Office fees, iron bars, wood stakes, printing, and vehicle expenses, plus H.S.T.

We require a retainer of \$ prior to starting the work. We accept cash, cheques, or e-transfers to (*your email*).

If you require any changes or additions to the survey, we must receive the request in writing. Any changes or additions are subject to additional fees.

Our invoice is to be paid upon our completion of the survey, prior to receiving the plan. Interest of 2% (rate of 26.82% per annum) will be charged on all overdue accounts. A digital (dwg) version of the plan will be forwarded to you upon your review and approval of our CAD disclaimer form.

If you have any questions, please do not hesitate to call.

Yours truly,

(*Your name*)
Ontario Land Surveyor

Date

I, (*client name*), authorise the
above survey and terms.



Surveyor's Real Property Report

(Date)

(Client name and address)

via email: (Client email address)

re: Surveyor's Real Property Report of
Lot , Concession
Geographic Township of
Township of

Further to your request, I am happy to confirm are retaining (*your company name*) to prepare a Surveyor's Real Property Report (SRPR) for the above property. The SRPR consists of two parts, a plan and a report detailing our findings. We will perform a Registry Office search and a field survey.

The plan will show the house and other buildings on the property. Features along the boundaries such as fences, hedges, or encroaching driveways or buildings will also be shown. Please note this plan will not show elevations.

Our estimate to perform this survey is \$, plus approximately \$ for disbursements for Registry Office fees, iron bars, wood stakes, printing costs and vehicle expenses, plus H.S.T. If you require any changes or additions to the survey, we must receive the request in writing. Any changes or additions are subject to additional fees.

Our invoice is to be paid upon our completion of the survey, prior to releasing the plan. Interest of 2% (rate of 26.82% per annum) will be charged on all overdue accounts.

Please sign below and return this letter to us, together with a retainer of \$ to authorise us to perform this work. We accept cash, cheques, or e-transfers to (your email address).

If you have any questions, please do not hesitate to call.

Yours truly,

(*Your name*)
Ontario Land Surveyor

Date

I, (*client name*), authorise the
above survey and terms.



Appendix B: More Sample Documents

The following documents can be copied and amended for use in your company.



Client Approval Letter (Prior to Finalising the Plan)

(Date)

(client name and address)

via email: (client email)

re: Severance Application No.
Part of Lot , Concession
Geographic Township of
Township of
Our File No.

Further to your confirmation letter dated (date) we have performed a Registry Office search and a field survey to prepare a reference plan for severed parcel of the above severance application.

Please find enclosed a copy of the draft reference plan for your review and approval, together with our invoice.

When we receive your approval and payment we will deposit the plan in the Land Registry Office. Final copies of the plan will be forwarded to you.

If you have any questions, please do not hesitate to call.

Yours truly,

(your Name)
Ontario Land Surveyor



Invoice

To: (Client name and address)

via email: (client's email)

Date:

Our File:

re: Severance Application No.
Part of Lot , Concession
Geographic Township of
Township of

To professional services rendered to perform
a Registry Office search and a field survey, and
to prepare a Reference Plan. \$

Disbursements for Registry Office fees, iron bars,
wood stakes, printing and vehicle expenses. \$

HST Registration No. R894523232 \$

Less retainer \$

Total payable upon receipt of invoice: \$

TERMS: Net 15 days, 2% per month charged on overdue accounts. This rate is
equal to 26.82% per annum.



Digital Data Disclaimer

The computer aided design (CAD) data is being provided at the request of and for the convenience of the recipient only. It may be incomplete, contain unintentional inaccuracies, or be partially obsolete. **(your company name)** makes no warranties, either expressed or implied, of its merchantability and fitness for any particular purpose. The user is further warned that, while all digital CAD data appears to be extremely accurate, this apparent accuracy is an artifact of the techniques used to generate it, and is in no way intended to imply actual accuracy. The user of this data takes full responsibility for the accuracy and correctness of all measurements, areas, inventories, etc. extracted from this data either manually or with the use of a computer.

The user is advised that any translation of CAD data from one computer system or environment to another can and often does result in the loss of important data. This loss can include, but may not be limited to: portions of text and dimensions; the existence, location or scale of symbols or other elements of graphics – the internal structure of data, including layers and data attributes; and the style or weight of lines. **(your company name)** makes no representations as to the usability of this CAD data on any system.

Users of this computer data are advised to review all current versions, as well as subsequent versions, of project documentation for inconsistencies and revisions. It is the responsibility of the user to identify and make all required revisions or corrections to this data. **(your company name)** will not routinely issue updates to CAD data.

By acceptance of this electronic media and the files it contains, the user agrees, to the fullest extent of the law, to indemnify and hold **(your company name)** harmless from any damage, cost, or liability, including but not limited to reasonable attorney's fees and cost of defense, arising from any changes made to these files and data without prior written consent of **(your company name)**.

While reasonable care has been used to ensure that the transfer medium and the material are free of computer viruses, **(your company name)** accepts no responsibility for any loss or damage that might result from the transmission of computer viruses in this process.

The copyright of this CAD data belongs to **(your company name)** and it may not be altered or modified or copied or transferred to another company or individual, either in part or in whole, without express written permission from **(your company name)**. This material is being furnished for reference purposes only, and has not been specially prepared for use by the recipient.

The terms of this disclaimer are effective immediately upon the User's receipt of digital information.

Name (please print):

Signature:

Company name (please print):

Title:

Project: