SAMPLE DOSSIER 01

Specialty HVAC / mechanical contractors, VA–NC

BUY BOX Specialty HVAC / mechanical contractors · Central Virginia + VA–NC corridor · roughly 15–80 employees · owner-operated preferred

18	5	4	0
primary contractors	call-first picks, with reasons	borderline names held out	paid databases used

Call these five first

1 Davis & Green

Richmond, VA · ~50–80 staff (est.) · Founded 1984 · high confidence

Founded 1984; the founders' son stepped into leadership in 2024, so the succession story is already public. Multi-trade with real HVAC volume, ~50–80 staff, Richmond core.

2 Automatic Climate

Richmond, VA · ~15–30 staff (est.) · Founded 1983 · high confidence

In business since 1983 with a named President on BBB. Mid-band size, ~1,300+ reviews, and a published contractor license for a quick DPOR check.

3 Dominion Service Co.

Richmond, VA · ~15–25 staff (est.) · Founded 1979 · high confidence

Tunnell family since 1979; the founder's sons run it today. Commercial + residential mix, ~15–25 staff, named President.

4 Kelleher HVAC

Richmond, VA · ~30–45 staff (est.) · Founded 1968 · high confidence

Three-generation family brand since 1968. ~38 staff / ~35 trucks in a 2019 trade profile (confirm current). HVAC, plumbing and electrical with deep Richmond roots.

5 Midlothian Mechanical

North Chesterfield, VA · ~15–40 staff (est.) · Founded 1996 · med confidence

Commercial + residential mechanical since 1996 with a named President and a published license. Confirm the parent-LLC (Consolitech) structure first; strong operator conversation either way.

How we sourced this

- Company About and team pages, BBB business profiles (principals, business-start dates), Virginia DPOR and NC licensing references, public directories and one trade profile.
- Headcount bands are estimates from public proxies (About-page counts, fleet size, directory estimates), not payroll data. ⚑ marks names that may sit under the 15-employee floor.
- Year founded appears only where a company page or BBB record states it. Owners are named only from public pages.
- Contact details are held back for the paid sheet. No paid databases, no invented contacts.

Same format, your buy box.

$1,000 per buy box, delivered within three business days once scope is confirmed and the invoice is paid.
Email your criteria to **info@shortlistmemo.com**. We confirm scope in writing before work starts.

All 18 primary contractors

Top 5	Company	Town	Est. headcount	Founded	Owner / president (public source)	Family / succession signal	Contact	Conf.
1	**Davis & Green**	Richmond, VA	50–80	1984	Greg Green (CEO); founders George & Lynn Green	Second generation took the lead in 2024	*Redacted*	HIGH
2	**Automatic Climate**	Richmond, VA	15–30	1983	Alan R. Purser (President, per BBB)	Family-owned signal (secondary directories)	*Redacted*	HIGH
3	**Dominion Service Co.**	Richmond, VA	15–25	1979	Chase Tunnell (President, per directories); Tunnell family	Founder's sons run it (second generation)	*Redacted*	HIGH
4	**Kelleher HVAC**	Richmond, VA	30–45 2019 figure	1968	Joe Kelleher (co-founder / longtime principal)	Three-generation family business	*Redacted*	HIGH
5	**Midlothian Mechanical**	North Chesterfield, VA	15–40	1996*	Kevin C. Kirsh (President, per BBB/site)	Operating brand of a parent LLC; no family signal	*Redacted*	MED
	Adams Heating & Air	Richmond, VA	15–40	1963	Robert W. Adams (President, per BBB); Adams family	Family-owned since 1963; current control not mapped	*Redacted*	MED
	DeltaTemp	Midlothian, VA	10–30 ⚑	1994	Kylie & Adam Draucker (current owners, per site)	Second generation (founders' daughter) owns it	*Redacted*	MED
	Fresh Air	Ashland, VA	10–30 ⚑	2011	Drew Everhart (owner, per public profiles)	Owner-operated; no succession signal	*Redacted*	MED
	Americool Heating & Cooling	Richmond, VA	10–25 ⚑	2003	Johnny Figueroa (owner, per directories)	Family-owned and operated (per site)	*Redacted*	MED
	Guirkin Plumbing, Heating & Air	Henrico, VA	15–40	1976	Tommy Guirkin (founder / owner, per site)	Founder-owned since 1976	*Redacted*	MED
	Snyder Solutions	Richmond, VA	10–25 ⚑	2009	Ryan Snyder (founder / CEO, per site)	Founder-led; growth-stage	*Redacted*	MED
	Force Mechanical	Fredericksburg, VA	15–40	2019	Jose Villasenor (President & co-owner, per site)	Co-owned by founders; no succession signal	*Redacted*	MED
	Loving Air	Fredericksburg, VA	20–40 13 trucks	2014	Shane Loving (founder, per site)	Founder-run; family active in business	*Redacted*	HIGH
	Maddox Air, Electrical & Plumbing	Lynchburg, VA	15–50	2008	John Maddox (President); Andy Maddox (VP) — per BBB/site	Family officers (BBB)	*Redacted*	MED
	Wisler Plumbing, Heating, Cooling & Electric	Rocky Mount, VA	35–55	1986	James Wisler (President); Brian Wisler — co-owners	Second generation bought out father in 2014	*Redacted*	HIGH
	Allen Kelly & Co.	Raleigh, NC	60–80 65+ team	1988	Allen Kelly (founder)	Second generation involved (per About)	*Redacted*	HIGH
	Streamline Services	Raleigh, NC	25–45	2003	Robert (Bob) Sweet (President, per BBB)	Family-owned; site says fifth-generation	*Redacted*	MED
	Boer Brothers Heating & Cooling	Chapel Hill, NC	20–40 20+ techs	2007	David Boer (owner, per directories); Boer family	Brothers-run family business	*Redacted*	MED

⚑ may sit under the 15-employee floor (phone-screen first) · * Midlothian Mechanical: Company site (midlomechanical.com/licenses-credentials): 'Founded in 1996'. BBB lists Business Started 3/1/1990 (LLC incorporated 11/1/2000) — sources differ

Borderline appendix: 4 names held out

Name	Town	Est. headcount	Founded	Owner (public source)	Why held out
River City Home Services	Ashland, VA	10–25	2011	Rusty Wood (President / founder, per site)	HVAC is one line among remodeling, flooring and handyman services; size is opaque and may be under 15.
Jones Heating, Air, Plumbing & Electrical	Charlottesville, VA	under 15 (directory 1–9)	2004	Jamie Jones (founder, per site)	Public size signals point below the 15-employee floor.
Assured Climate Heating & Cooling	Chesterfield, VA	10–30	1996	Mark Lee (owner / CEO, per company About)	Owner named on company About (Mark Lee; est. 1996), but size is opaque. Promote after a phone screen.
Taylor Heating & Air	North Chesterfield, VA	10–30	1998	Wes Taylor (owner signal, secondary listings — soft)	Soft ownership signal; size poorly documented. Low confidence.

A live engagement can promote any of these after a phone screen. Full rows are in the spreadsheet.