

## 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

primary contractors

5

call-first picks, with reasons

4

borderline names held out

0

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.

### 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.

### 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.

### 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.

### 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.

## 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.

\$2,000 per buy box, three business days from scope confirmation.

Email your criteria to [info@shortlistmemo.com](mailto: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<br>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 Villaseñor (President & co-owner, per site)           | Co-owned by founders; no succession signal          | Redacted | MED   |
|       | Loving Air                                   | Fredericksburg, VA     | 20–40<br>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<br>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<br>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.