



RENT BOARD

July 23, 2025

5:00 PM

ZOOM INFORMATION:

Join from PC, Mac, iPad, or Android:

<https://portlandmaine->

[gov.zoom.us/j/89573671630?pwd=PEAlG9Nv2eu0bN8scaeWmfut2YOn1C.1](https://portlandmaine-gov.zoom.us/j/89573671630?pwd=PEAlG9Nv2eu0bN8scaeWmfut2YOn1C.1)

Passcode:515179

Phone one-tap:

+13092053325,,89573671630#,,,,*515179# US

+13126266799,,89573671630#,,,,*515179# US (Chicago)

Join via audio:

+1 309 205 3325 US

+1 312 626 6799 US (Chicago)

+1 646 931 3860 US

+1 929 205 6099 US (New York)

+1 301 715 8592 US (Washington DC)

+1 305 224 1968 US

+1 669 900 6833 US (San Jose)

+1 689 278 1000 US

+1 719 359 4580 US

+1 253 205 0468 US

+1 253 215 8782 US (Tacoma)

+1 346 248 7799 US (Houston)

+1 360 209 5623 US

+1 386 347 5053 US

+1 507 473 4847 US

+1 564 217 2000 US

+1 669 444 9171 US

Webinar ID: 895 7367 1630

Passcode: 515179

International numbers available: <https://portlandmaine-gov.zoom.us/j/kwnoAr1ft>

II. ROLL CALL:

III. APPROVAL OF MINUTES

- a. June 11, 2025 Minutes
- b. June 25, 2025 Minutes

IV. COMMUNICATIONS:

Please note: Written public comment must be received via email (rentboard@portlandmaine.gov) by 12pm the day before the scheduled meeting. The subject line needs to read "Written Public Comment"

- a. Rent Control Q2-2025
- b. Communication from City Staff

V. UNFINISHED BUSINESS:

- a. Rent Increase Application - Public Comment
Owner: Saunders Street Apartments LLC, 51 Belfield Rd, Cape Elizabeth, ME 04107
Representative: Willard Bollenbach and Randi Bollenbach, 51 Belfield Rd, Cape Elizabeth, ME 04107
Address: 23 Saunders St, all 5 units
CBL: 130-G-014-001
- b. Rent Increase Application - Public Comment
Owner: 9 Powsland Street Portland LLC, 439 US Route 1 Ste A, York, ME 03909
Representative: Maine Registered Agent LLC, 439 US Route 1 Ste A, York, ME 03909
Address: 9 Powsland St, Units 1-3
CBL: 190-J-003-001

VI. New Business

- a. Rent Increase Application - Completeness Review
Owner: Matthew Davies, 56 Marlu St, Westbrook, ME 04092

Address: 135 Sheridan St, Unit 102
CBL: 013-K-002-102

- b. Schedule Special Meeting

VII. Adjourn

Remote Rent Board Meeting Minutes - Held Via Zoom

Wednesday, June 11, 2025

II. ROLL CALL - 0:00:50

Matthew Lax, Tenant, District 1 - Chair
Austin Sims, Homeowner, District 5 - Vice Chair - Absent
Anne-Laure Razat, Tenant, At-Large
Kristen Carreras, Landlord, At-Large - Absent
Matthew Walker, Tenant, District 2
Christopher "Christopher "Buddy" Moore" Moore, Tenant, District 3
District 4 - Vacant

Staff present:

Dylan Orr, Rental Registration Coordinator
Adam O'Connor, Rental Registration Inspector
Benjamin Plante, Counsel for the Rent Board

III. COMMUNICATIONS - 0:01:30

IV. New Business - 0:01:45

a. Rent Increase Appeal - Public Comment

Appellant: Portland Tenant's Union

Address: 28 St. George St, Unit 3

Property Owner: John Clemons and Abigail Harper

CBL: 082-E-011-001

0:04:50 - The Portland Tenants Union presents the appeal.

0:48:00 - Public comment received.

2:00:10 - Christopher "Buddy" Moore moves to close the public record. Seconded by Anne-Laure Razat. (4-0; Carreras and Sims absent) The motion passes.

2:02:12 - Christopher "Buddy" Moore moves that pursuant to to the definition of "rent" and "rental unit" in Section 6-232, as of the base year tenant access to and use of the driveway, parking spots, garage bay storage area, yard, garden, laundry, deck and all other common areas as well as the ability to keep pets on the premises are considered inclusive of said definition of rent. Seconded by Matthew Lax. (4-0; Carreras and Sims absent) The motion passes.

2:19:10 - Christopher "Buddy" Moore moves to find that tenant access to and use of driveway, parking spots, garage bay storage area, yard, garden, laundry, deck and all other common areas as well as the ability to keep pets on the premises were included in the rent charged for Unit 3 at

the time of the base rent of the unit was established. Seconded by Anne-Laure Razat. (4-0; Carreras and Sims absent) The motion passes.

2:40:26 - Anne-Laure Razat moves to find the "optional fees" as included in the leases at 28 St George Street were presented as mandatory by the landlord to all tenants and interested renters as evidenced in written testimony and public comment. Seconded by Matthew Lax. (4-0; Carreras and Sims absent) The motion passes.

3:07:55 - Anne-Laure Razat moves to find the landlord of 28 St George Street, Unit 3 has been in substantial non-compliance with respect to 6-234(c) raising the rent of a covered unit more than 10% in 2024 from the time the lease was entered into to the last time non-compliant rent was charged. Seconded by Matthew Lax. (4-0; Carreras and Sims absent) The motion passes.

3:12:25 - Anne-Laure Razat, consistent with section 6-234(f) in accordance with the ruling that the landlord at 28 Saint George Street has been found be in substantial noncompliance, moves that all banked rent at 28 Saint George Street be forfeited from the time the lease was entered to the last time non-compliant rent was charged. Seconded by Matthew Walker. (4-0; Carreras and Sims absent) The motion passes.

3:38:42 – Matthew Walker moves that the tenants are to be repaid \$18,860 which is comprised of \$18,396 of rent overpayments, plus \$364 of overcharged security deposit, plus \$100 of unallowed security deposit and to find that rent must be reduced to the last compliant rent of \$1100. (4-0; Carreras and Sims absent) The motion passes.

4:02:30 – Matthew Walker moves to find that the failure to register unit 3 in 2024 license year constitutes a failure to register in violation of 6-233(a). (4-0; Carreras and Sims absent) The motion passes.

4:05:24 – Matthew Lax moves to recommend fines of \$100 per incidence of each month that rent was overcharged which was 12 months from the period of July 2024 through June 2025, totaling \$1200. \$500 for failure to register Unit 3 in 2024. (4-0; Carreras and Sims absent) The motion passes.

4:29:31 – Christopher "Buddy" Moore moves to find the Notice to Quit provided by the Landlord of 28 St George St, units 1 and 3 constitutes a violation of 6-237(e) of the Portland City Code. (4-0; Carreras and Sims absent) The motion passes.

4:35:11 - Anne-Laure Razat moves to recommend the landlord be fined \$200 per day per unit for units 1 and 3 at 28 St George St for the retaliatory act beginning June 1, 2025 until the retaliation is withdrawn; either the tenants are reoffered the unit for an agreed upon period of time, the tenants vacate by mutual agreement or the tenants' tenancy is lawfully terminated. (4-0; Carreras and Sims absent) The motion passes.

V. Adjourn - 4:53:36

4:53:52 - Anne-Laure Razat moves to adjourn. Seconded by Christopher "Buddy" Moore. (4-0; Carreras and Sims absent) The motion passes.

Remote Rent Board Meeting Minutes - Held Via Zoom

Wednesday, June 25, 2025

II. ROLL CALL - 0:00:30

Matthew Lax, Tenant, District 1 - Chair
Austin Sims, Homeowner, District 5 - Vice Chair
Anne-Laure Razat, Tenant, At-Large
Kristen Carreras, Landlord, At-Large - absent at time of roll call
Matthew Walker, Tenant, District 2
Christopher "Buddy" Moore, Tenant, District 3
District 4 - Vacant

Staff present:

Dylan Orr, Rental Registration Coordinator
Benjamin Plante, Counsel for the Rent Board

III. APPROVAL OF MINUTES - 0:01:05

a. May 15, 2025 Minutes

b. May 28, 2025 Minutes

c. June 5, 2025 Minutes

0:01:45 - Anne-Laure Razat moves to approve all rent board minutes. Seconded by Matthew Walker. (5-0; Carreras absent) The motion passes.

IV. COMMUNICATIONS - 0:02:30

a. Written Public Comment #1 - 0:02:50

0:12:08 - Chair Lax moves refer to a sub-committee of two rent board members for further discussion and recommendations back to the Rent Board to present recommendations and or form changes. Seconded by Austin Sims. (5-0; Carreras absent) The motion passes.

V. UNFINISHED BUSINESS - 0:15:50

a. Findings of Fact & Conclusions of Law - 0:15:52

0:17:40 - Austin Sims moves to approve finding of fact and decision form for 29 Parris street. Seconded by Matthew Walker. (5-0; Carreras absent) The motion passes.

0:20:43 - Austin Sims would move to adopt the decision for 25-27 Montreal Street as written. Seconded by Matthew Lax. (4-0; Carreras absent, Walker recused) The motion passes.

0:25:52 - Austin Sims would move to adopt the decision form for 63 Grant Street, 65 Grant Street, and 69 Grant Street. Seconded by Matthew Lax. (5-0; Walker recused) The motion passes.

0:26:49 - Kristen Carreras joins the meeting

b. Rent Increase Appeal - 0:27:30

Appellant: Trelawny Tenants Union

Address: 655 Congress St

Owner: Trelawny 657 LLC, 657 Congress St, First Floor, Portland, ME 04101

CBL: 046-D-021-001

0:28:58 - Christopher "Buddy" Moore moves pursuant to section 6-243(a) and based on the evidence provided by the Trelawny Tenants Union, Trelawny Tenants Union has sufficiently demonstrated that they are asserting the rights of all tenants at 655 Congress St. Seconded by Anne-Laure Razat. (5-0; Walker recused) The motion passes.

0:30:40 - Christopher "Buddy" Moore moves to find 657 Congress St, LLC in substantial noncompliance of section 6-234(b)(c) of the Rental Stabilization Ordinance at 655 Congress Street as evidenced by the ongoing violations from December 2022 to the date of this meeting June 25, 2025. Seconded by Kristen Carreras. (5-0; Walker recused) The motion passes.

0:39:42 - Christopher "Buddy" Moore amends the previous motion to replace "to the date of this meeting June 25, 2025" to "to the date of the hearing, May 28, 2025". Seconded by Matthew Lax. (5-0; Walker recused) The amended motion passes.

0:40:21 - Vote on motion. (5-0; Walker recused) The motion passes.

0:41:11 - Consistent with section 6-234(f) and the Boards previous findings and in accordance with our ruling that the landlord of 655 Congress St has been found not to be in substantial compliance, Christopher "Buddy" Moore moves that all banked rent at 655 Congress St be forfeited from December 1, 2022 until the hearing on May 28, 2025. Seconded by Matthew Lax. (5-0; Walker recused) The motion passes.

0:43:40 - Anne-Laure Razat moves consistent with section 6-234(f) and the Boards previous findings and in accordance with our ruling that the landlord of 655 Congress St has been found not to be in substantial compliance, all banked rent be forfeited from December 1, 2022 until the date of the filing of the complaint. Seconded by Kristen Carreras.

0:44:52 - Christopher "Buddy" Moore amends the motion from "the date of the filing of the complaint" to "the date of this hearing." Seconded by Austin Sims.

0:47:24 - Chair moves to rescind the motion. Seconded by Kristen Carreras. (5-0; Walker recused) The motion passes.

0:48:05 - Anne-Laure Razat moves to find consistent with section 6-234(f) in accordance with the ruling that the landlord at 655 Congress Street has been found not to be in substantial compliance with provisions of Chapter 6 of the City code. To find that every rent increase that has been imposed since December 1st, 2022 to the date of this hearing, May 28, 2025, is and was prohibited. The last compliant rent level that was charged in each unit in either property was either the rent charged December 1st, 2022 or a prior rent level as identified by the Licensing and Housing Safety Division in a notice of violation. All rents demanded, accepted, or retained above that last compliant rent level must be refunded to the tenant or tenants of that unit. Seconded by Christopher "Buddy" Moore. (5-0; Walker recused) The motion passes.

1:03:00 - Christopher "Buddy" Moore, consistent with section 626(f) which gives the board the power to determine appropriate penalties, moves that the landlord of 655 Congress Street pay a fine of \$120,000 based on the stated calculations of 433 months at \$250 per month and 47 additional violations at \$250 per violation. Seconded by Matthew Lax. (5-0; Walker recused) The motion passes.

c. Rent Increase Application - Completeness Review - 1:06:10

Owner: Saunders Street Apartments LLC, 51 Belfield Rd, Cape Elizabeth, ME 04107

Representative: Willard Bollenbach and Randi Bollenbach, 51 Belfield Rd, Cape Elizabeth, ME 04107

Address: 23 Saunders St, Unit 5

CBL: 130-G-014-001

1:08:04 - Willard "Bollie" Bollenbach presents the application.

1:55:23 - Matthew Walker moves to close the completeness check and schedule a public hearing for the next regular meeting with the expectation that the application provides the expected materials as outlined in the discussion. Seconded by Austin Sims. (6-0) The motion passes.

1:58:00 through 2:08:00 - The Board takes a recess.

VI. New Business - 2:09:00

a. Rent Increase Application - Completeness Review - 2:09:05

Owner: 9 Powsland Street Portland LLC, 439 US Route 1 Ste A, York, ME 03909

Representative: Maine Registered Agent LLC, 439 US Route 1 Ste A, York, ME 03909

Address: 9 Powsland St, Units 1-3

CBL: 190-J-003-001

2:10:15 - Kieran Connelly, a representative for the property owner, presents the application.

3:09:20 - Kristen Carreras moves to schedule a public hearing for the application considering it is complete with all the supplemental information requested. Seconded by Christopher "Buddy" Moore. (6-0) The motion passes.

b. Rent Increase Application - Completeness Review - 3:11:10

Owner: Timothy Trujillo & Daniel Alrick, 61 Central Ave, San Francisco, CA 94117

Address: 142 Massachusetts Ave

CBL: 186-A-019-001

3:12:20 - Timothy Trujillo presents the application.

3:54:25 - Kristen Carreras moves to return application to applicant to complete items that have been listed. Seconded by Anne-Laure Razat. (6-0) The motion passes.

VII. Adjourn - 3:56:55

3:57:09 - Kristen Carreras moves to adjourn. Seconded by Anne-Laure Razat. (6-0) The motion passes.



TO: Housing & Economic Development Committee
CC: Rent Board
FROM: Jessica B. Hanscombe, Director of Permitting and Inspections
DATE: July 14, 2025
RE: Quarterly Rent Control Report- Q2-2025

Rent Control Report Quarter 2 (4/1/2025-6/30/2025)

Rent Board

	Total # of Applications	Total # of Applications approved	Total # of Applications Denied	Total # of Applications Tabled
Rent Increases	8	5	0	0
Complaints	3	3	0	0
Other	1	1	0	0
Quarter 2 Total:	12	9	0	0
Year to date Total	20	9	0	8

Rent Control Inspections

Type of Inspections	Total # Properties	Total # of units
Complaints (Potential violations reported to our office)	*21	288
Audits (Proactive enforcement based on percentage that rent was increased)	102	827
Quality Control (proactive verification of data supplied to our office)	173	458
Quarter 2 Total:	296	1,573
Year to date Total	538	4,451

*Breakdown of Complaints by property:

	Founded Complaints *violation exists	Unfounded Complaints *no violation	In Progress *actively investigating
Quarter 2 Total	6	5	10

City of Portland | Permitting and Inspections
Zachary Lenhert, Licensing and Housing Safety Manager



To: City of Portland Rent Board
From: Licensing and Housing Safety Office
Re: Employment Position - Rental Registration Inspector

At the City Council meeting on June 23, 2025 the Council voted to approve Budget Order 214, Amendment #6. This budget amendment approves the appropriate funds for the addition of a second Rental Registration Inspector.

Thank you,

Dylan Orr
City of Portland
Business Licensing & Housing Safety Office

City of Portland – Housing Safety Division
Maintenance of Net Operating Income Application

Date of Hearing:

December 18, 2024 – Tabled to January 22, 2025 – Tabled to March 26, 2025
– Tabled to June 25, 2025 – Tabled to July 23, 2025

Landlord Name and Address:

Willard and Randi Bollenbach
51 Belfield Road
Cape Elizabeth, ME 04107

Property Address:

23 Saunders Street, Unit 5
Portland, ME 04103

CBL:

130-G-014-001

City of Portland – Housing Safety Division
LANDLORD APPLICATION FOR RENT INCREASE SUMMARY

Date of Hearing:

June 25, 2025 – Tabled to July 23, 2025

Owner Name and Address:

9 Powsland Street Portland LLC
439 US Route 1 Ste A
York, ME 03909

Agent Name and Address: Maine

Registered Agent LLC
439 US Route 1 Ste A
York, ME 03909

Property Address and Unit:

9 Powsland St, Units 1-3

CBL:

190-J-003-001

Tenants/Interested Parties:

Yes

City of Portland | Permitting and Inspections
Zachary Lenhert, Licensing and Housing Safety Manager



July 16, 2025

Re: Notice of Public Hearing

To: Tenants of 9 Powsland St

This is a notice of a public hearing before the Rent Board at their next scheduled meeting on **Wednesday, July 23, 2025** at 5pm. This meeting will be held via Zoom.

The property owner for the above address, **9 Powsland Street Portland LLC**, has submitted a "Landlord Worksheet/Petition for Rent Board Approved Rent Increase".

The Zoom link will be accessible by **Wednesday, July 16, 2025** at the link below:
<http://portlandmaine.gov/129/Agendas-Minutes>

***Please note:** Written public comment must be received via email (rentboard@portlandmaine.gov) by 12pm the day before the scheduled meeting. Please make sure that the subject line reads "Written Public Comment".

Thank you,

Dylan Orr
Rental Registration Coordinator
City of Portland
389 Congress St
Portland, ME 04101

City of Portland Permitting and Inspections Department Landlord Worksheet/Petition for Rent Board Approved Increase Rent Increase using Fair Return Standard: Maintenance of Net Operating Income (MNOI)

Note to Applicants

All information and documentation provided in this application will be made available to the public, pursuant to applicable public access laws in the State of Maine. An Applicant may choose to redact sensitive information contained herein, including, but not limited to bank account information, debit card or credit card information, government-issued identification information, personal contact information such as phone numbers, email addresses, tenant or employee names, or other personally identifying information. The Rent Board may act within its authority to request any additional information it deems pertinent to the application at hand.

Introductory Information

A landlord is entitled to a fair return on investment, which means an amount sufficient to allow a just and reasonable rate of return, to encourage the investment of capital in the rental housing market, to fairly compensate investors for the risks they have assumed, and to achieve minimum constitutionally protected standards.

Pursuant to the Rent Control Ordinance, the fair return on investment must be calculated using Maintenance of Net Operating Income (MNOI). This methodology presumes the net operating income the landlord earned from a Covered unit during the calendar year 2019 yielded a fair return on investment unless the landlord proves that special or peculiar circumstances prevented the landlord from receiving a fair return on investment during that period. To qualify for an MNOI increase, the landlord has to file this application for a hearing by the Rent Board.

1. Presumption of Base Year Net Operating Income

It shall be presumed that the net operating income received by the landlord during the calendar year 2019 (the Base Year) yielded a Fair Return on investment. This presumption may be rebutted, in which case an adjusted Base Year Net Operating Income shall be used.

2. Fair Return

A landlord has the right to obtain a net operating income equal to the Base Year (2019) net operating income adjusted by 100% of the percentage increase in the Consumer Price Index (CPI), since the Base Year. It shall be presumed this standard provides a Fair Return.

3. Base Year:

- a. Calendar year 2019 is the Base Year.
- b. In the event that a prior determination of the allowable Rent is made pursuant to a Fair Return petition, if a subsequent petition is filed, the Base Year shall be the year that was considered as the "current year" in the prior petition.
- c. Unless otherwise exempted from the limitation on rent increases by local, state or federal laws or regulations, if a Rental Unit enters the marketplace for the first time after 2019, the Base Year shall be the year the Unit entered the marketplace.

4. Current Year

The "current year" shall be the calendar year preceding the petition.

5. CPI (Consumer Price Index)

The annual CPI for the current year for All Urban Consumers for the Greater Boston Metro area (All Urban Consumers, All Items) provided by the U.S. Bureau of Labor Statistics [[Bureau of Labor Statistics Data \(bls.gov\)](https://www.bls.gov)].

6. Limits of Allowable Rent Increases in Any One Year

If the amount of any rent increase granted pursuant to a fair return petition exceeds 10%, the portion in excess of 10% shall be deferred to the next year or years following the procedure for Banked Rent.

General Information About the Property

Street Address: _____

Parcel Numbers(s): _____

Year Property Purchased by Current Owner: _____

Total Number of Units on the Property: _____

Total Number of Units Affected by Proposed Rent Increase: _____

Are there Rental Units that are Partially or Fully Exempt (circle)? Yes ☐ No ☒

If yes, number of Exempt Rental Units and Basis for Exemption: _____

I. Landlord Information

Name:  _____

Phone() _____

Business Address: _____

City, State, Zip: _____

Business E-mail: _____

II. Agent Information (if applicable)

Name: _____

Phone(s): _____

Business Address: _____

City, State, Zip: _____

Business E-mail: _____

III. Services

Please check the applicable box to identify the manner in which each service is paid.

	Paid by Landlord, but not passed through to Tenants	Tenants pay service directly	Landlord pays service and passes cost through to Tenants
Gas	☐	☐	☐
Electricity	☐	☐	☐
Water	☐	☐	☐
Sewer	☐	☐	☐
Garbage	☐	☐	☐
Other:	☐	☐	☐

**Fidium Wifi /
ring cam**

Purple trash bags

IV.Changes to Services

Briefly describe the services provided to the rental units. Include all services provided and state which services are provided without additional charge.

If there have been any changes to the services listed above or in the responsibility for their payment since the base year, please explain:

V. Income and Expense Explanation and Calculation

Calculation of Net Operating Income

Net operating income shall be calculated by subtracting operating expenses from gross rental income.

Gross Rental Income

Gross rental income includes:

- Scheduled rental income at one hundred percent (100%) occupancy plus all other income or consideration received or in connection with the use or occupancy of the Rental Unit.
If there is a change in the number of rental units between the Base Year & Current Year, the rental income and expenses for the same number of units shall be used in calculating the net operating income for both periods. The purpose of this provision is to provide a fair compensation between the Base Year and the Current Year.
- Vacant or owner-occupied rental units at the time a petition is filed, that provided rental income in the Base Year, shall count toward the calculation of gross rental income in the Current Year. The Rent Program shall attribute rental income calculated on the basis of average rents for comparable units at the property that were most recently rented. If no comparable units on the property were rented within the last two years, initial rents for comparable units in the City may be used if there is no other basis for its calculation.

Gross rental income shall not include:

- Utility charges that are sub-metered, for gas, electricity or water paid directly by the tenant;
- Charges for refuse disposal, sewer service or other services (which are either provided solely on a cost pass-through basis if they are regulated by state or local law)

VI. Operating Expenses

Operating expenses include reasonable costs of operation and maintenance of the Rental Unit, including:

- Management Expenses;
- Utility Costs except a utility that are paid directly by the tenant(s);
- Real Property Taxes Assessed and Paid;
- Insurance;
- License, Registration and other Public Fees;
- Landlord-performed Labor;
- Legal Expenses;
- The Amortized Costs of Capital Improvements; and
- Other Reasonable Operating Expenses.

Operating expenses shall not include the following:

- Mortgage principal or interest payments or other debt service costs and costs associated with obtaining financing;
- Any penalties, fees or interest assessed or awarded for violation of any provision of this chapter or of any other provision of law;
- Land lease expenses;
- Political contributions and payments to organizations or individuals which are substantially devoted to legislative lobbying purposes;
- Depreciation;
- Any expenses for which the Landlord has been reimbursed by any utility rebate or discount, Security Deposit, insurance settlement, judgment for damages, settlement or any other method or device;
- Unreasonable increases in expenses since the Base Year;
- Expenses associated with the provision of master-metered gas and electricity services;

- Expenses which are attributable to unreasonable delays in performing necessary maintenance or repair work or the failure to complete necessary replacements. (For example if a roof replacement is unreasonably delayed, the full cost of the roof replacement would be allowed; however, if interior water damage occurred as a result of the unreasonable delay, that expense would not be allowable to support a fair return); and
- Unreasonable Expenses.

Claim for Base Rent Adjustment

A claim may be made for a Base Year Rent Adjustment if the Base Year Rent and/or earlier rent amounts were disproportionately low. A Base Year Rent Adjustment will be considered if the evidence supporting a requested adjustment is provided and sufficiently compelling enough to show that special or peculiar circumstances prevented the landlord from receiving a fair return on investment during that period. Landlords may rebut the presumption that the Base Year net operating income provided a fair return. If a claim is made on this basis, the petitioner must complete Section XIX, Claim for Adjustment of Base Year Net Operating Income and Associated Rent Adjusted Claim at the end of this Application.

Check here ☐ if a claim for a Base Year Rent Adjustment is included in this application and complete Section XVIII of this Application.

VII. Income Worksheet

	Base Year (2019) ¹ 2020 #s used	Current Year (2024) May '24 - April '25
Rental Income		
1. Gross scheduled rental income (total for the calendar year) including uncollected rent.	\$ _____	\$ _____
2. Portion Attributable to Vacancy	\$ _____	\$ _____
Fees (indicate what fee is for):		
3. Late fees	\$ _____	\$ _____
4. List fees, other than utilities, collected for services & amenities not included in rent	\$ _____	\$ _____
5. _____	\$ _____	\$ _____
6. _____	\$ _____	\$ _____
7. _____	\$ _____	\$ _____
Other Income (list separately by type)²:		
8. _____	\$ _____	\$ _____
9. _____	\$ _____	\$ _____
10. _____	\$ _____	\$ _____
Fees charged by landlord for Utilities		
11. Gas	\$ _____	\$ _____
12. Electricity	\$ _____	\$ _____
13. Water	\$ _____	\$ _____
14. Sewer	\$ _____	\$ _____
15. Garbage & Recycling	\$ _____	\$ _____
Other Utilities (list separately by type):		
16. _____	\$ _____	\$ _____
17. _____	\$ _____	\$ _____
18. TOTAL INCOME	\$ _____	\$ _____
(add only lines 1 and 3-17)		

¹ or an alternative year in the event of extenuating circumstances.

² Interest earned by Landlord on Tenant security deposits, other interest, or investment income.

VIII. Operating Expense Worksheet

Additional operating expense items can be listed for this worksheet using separate page(s) as needed.

	Base Year 2020	Current Year May '24 - April '25
1. Assessments	\$ _____	\$ _____
2. Real Property Taxes	\$ _____	\$ _____
3. License Tax/Fee	\$ _____	\$ _____
4. Rent Board Registration Fees	\$ _____	\$ _____
5. Insurance	\$ _____	\$ _____
6. Accounting	\$ _____	\$ _____
7. Legal Corporate Filings, Registered Agent Fees	\$ _____	\$ _____
8. Manager /Management Services	\$ _____	\$ _____
9. Security	\$ _____	\$ _____
10. Office Supplies	\$ _____	\$ _____
12. Normal Repairs	\$ _____	\$ _____
13. Owner-Performed Labor	\$ _____	\$ _____
14. Plumbing Maintenance	\$ _____	\$ _____
15. Pool Maintenance	\$ _____	\$ _____
16. Landscape Maintenance/snow removal	\$ _____	\$ _____
17. Other Maintenance	\$ _____	\$ _____
18. Parking Lot/Street Maintenance	\$ _____	\$ _____
19. Gas (separately metered only)	\$ _____	\$ _____
20. Electricity (separately metered only)	\$ _____	\$ _____
21. Water	\$ _____	\$ _____
22. Sewer	\$ _____	\$ _____
23. Amortized portion of Capital Expense (see Sections X, XI and XII column (i))	\$ _____	\$ _____
24. Vandalism Repairs	\$ _____	\$ _____
25. Uninsured Damages	\$ _____	\$ _____
27. TOTAL OPERATING EXPENSES	\$ _____	\$ _____

IX.Allowances for Capital Improvements

Operating expenses include the amortized costs of capital improvements plus an interest allowance to cover the amortization of those costs. A capital improvement shall be any improvement to a unit or property which materially adds to the value of the property, appreciably prolongs its useful life or adapts it to a new use and has a useful life of more than one year and a direct cost of \$250.00 or more per unit.

Allowances for capital improvements shall be subject to the following conditions:

1. The amortization period shall be in conformance with the schedule adopted by the City, as provided in Section XI, unless it is determined that an alternate period is justified based on the evidence presented at the Rent Board hearing.
2. Capital improvement costs do not include costs incurred to bring the Rental Unit into compliance with a provision of Portland Code or state law where the original installation of the improvement was not in compliance with code requirements.

Example of a Capital Improvement with Amortized Expenses and an Interest Allowance:

Owner filed a Petition on March 1, 2023 for an individual rent adjustment for a roof that was completed covering a four-rental unit building. The cost of the Capital Improvement was \$20,000 benefiting all four units in the building. The amortization period for a roof is ten (10) years according to the below tables. The applicable interest allowance based on the Primary Mortgage Survey is 3.88% + 2% for this example. The calculation of the capital improvement per month is:

Capital Improvement Cost	Interest Allowance	Period	Total Principal & Interest – Life of Improvement	Total Interest – Life of Improvement
\$20,000	5.88%	10 years (120 months)	\$26,500.52	\$6,500.52

Annual Amortized Cost	Monthly Amortized Cost	# of Units	Monthly Cost per Unit
\$2,650.05	\$220.84	4	\$55.21

X. Amortization Period of Capital Improvements/Expenses

In amortizing capital improvements/ expenses, the following schedule shall be used to determine the amortization period of the capital improvements and expenses. Improvements add to the health & safety of the rental unit.

	Years
Appliances	
Air Conditioners*	10
Refrigerator*	5
Stove*	5
Garbage Disposal	5
Water Heater*	5
Dishwasher	5
Microwave Oven	5
Washer/Dryer	5
Basic Items	
Fans*	5
Cabinets*	10
Carpentry	10
Counters*	10
Doors*	10
Knobs	5

	Years
Screen Doors	5
Fencing and Security*	5
Management	5
Tenant Assistance	5
Structural Repair and Retrofitting	
Foundation Repair*	10
Foundation Replacement*	20
Foundation Bolting*	20
Iron or Steel Work	20
Masonry-Chimney Repair*	20
Shear Wall Installation*	10
Electrical Wiring*	10
Elevator*	20
Fencing	
Chain	10
Block	10
Wood	10

	Years
Fire Systems	
Fire Alarm System*	10
Fire Sprinkler System*	20
Fire Escape*	10
Flooring/Floor Covering	
Hardwood	10
Tile and Linoleum	5
Carpet	5
Carpet Pad	5
Subfloor	10
Fumigation Tenting*	5
Furniture	5
Automatic Garage Door Openers*	10
Gates	
Chain Link	10
Wrought Iron	10
Wood	10

	Years
Glass	
Windows*	5
Doors*	5
Mirrors	5
Heating*	
Central	10
Gas	10
Electric	10
Solar	10
Insulation	10
Landscaping	
Planting	10
Sprinklers	10
Tree Replacement	10
Lighting	

	Years
Interior*	10
Exterior*	5
Exterior	
Locks*	10
Mailboxes*	10
Meters*	10
Plumbing	
Fixtures*	10
Pipe Replacement*	10
Re-Pipe Entire Building*	20
Shower Doors*	5
Painting	
Interior	5
Exterior	5
Paving	
Asphalt	10
Cement	10

	Years
Decking	10
Plastering	10
Sump Pumps*	10
Railings*	10
Roofing*	
Shingle/Asphalt	10
Built-up, Tar and Gravel	10
Tile	10
Gutters/Downspouts	10
Security*	
Entry Telephone Intercom	10
Gates/Doors	10
Fencing	10
Alarms	10
Sidewalks/Walkways*	10
Stairs	10
Stucco	10

	Years
Tilework	10
Wallpaper	5
Window Coverings*	
Drapes	5
Shades	5
Screens	5
Awnings	5
Blinds/Mini-blinds	5
Shutters	5

*Capital Improvements generally concern any change or addition to a unit or property which materially adds to the value of the property, appreciably prolongs its useful life or adapts it to a new use and has a useful life of more than one year and a direct cost of \$250 or more per unit.

The * items are likely capital improvements. Other items may depend on the circumstances.

XI. Interest Allowance on Capital Improvements

If an amount was reported as an amortized portion of expenses on Section IX, Operating Expense Worksheet, line 23 of the Base Year or current operating expense table above, complete this section.

An interest allowance may be calculated on the cost of amortized expenses. The interest allowance shall be the interest rate equivalent to the "average rate" for a thirty-year fixed rate on home mortgages plus two percent (2%). The "average rate" shall be the rate Freddie Mac last published in its weekly Primary Mortgage Market Survey (PMMS) as of the date of the initial petition. <http://www.freddiemac.com/pmms/archive.html>

Please use the Microsoft Excel version of this page (available from the Housing Safety Office) or an online amortization calculator to ensure that your numbers are correct.

Completed Capital Improvement and Expense Worksheet (Base Year)

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)
Item #	Brief Description	# of Units Impacted	Initial Cost	Interest Rate Allowed*	Amortization Period (years)*	Interest Amount	Total Cost [Principal + Interest]	Annual Cost	Monthly Cost	Monthly Cost Per Unit
___	_____	___	\$ _____	_____%	___	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
___	_____	___	\$ _____	_____%	___	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
___	_____	___	\$ _____	_____%	___	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
___	_____	___	\$ _____	_____%	___	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
___	_____	___	\$ _____	_____%	___	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
___	_____	___	\$ _____	_____%	___	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

*Use the amortization table in this Attachment and the information about interest rates.

Total for Base Year [add amounts in column (d)]: \$ _____

Annual Cost for Base Year [add amounts in column (i)]: \$ _____

Completed Capital Improvement and Expense Worksheet **May '24 - April '25**

This list may include any capital expenses that are still being amortized in the current year. For example, if a roof was replaced last year, the amortized portion may be counted in the current year.

(a) Item #	(b) Brief Description	(c) # of Units Impacted	(d) Initial Cost	(e) Interest Rate Allowed*	(f) Amortization Period (years)*	(g) Interest Amount	(h) Total Cost [Principal + Interest]	(i) Annual Cost	(j) Monthly Cost	(k) Monthly Cost Per Unit
_____	_____	_____	\$ _____	_____ %	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	_____ %	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	_____ %	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	_____ %	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	_____ %	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	_____ %	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

*Use the amortization table in this Attachment and the information about interest rates.

Total for Current Year [add amounts in column (d)]: \$ _____

Annual Cost for Current Year [add amounts in column (i)]: \$ _____

May '24 - April '25

XII. Blank Worksheet (Optional – Available for Petitioner Use)

XIII. Owner-Performed Labor

Landlord-performed labor shall be compensated at reasonable hourly rates. However, no Landlord-performed labor shall be included as an operating expense unless the Landlord submits documentation showing the date, duration, and nature of the work performed. There shall be a maximum allowed under this provision of five percent (5%) of gross income unless the Landlord demonstrates that greater services were performed for the benefit of the residents.

Owner Performed Labor – Base Year

Date (or Range)	Hours	Hourly Rate	Units Impacted	Type of Work
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Owner Performed Labor – Current Year

Date	Hours	Hourly Rate	Units Impacted	Type of Work
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

XIV. Planned Capital Improvements

To encourage necessary capital improvements and expenses, a Landlord may include anticipated future expenses for the amortized cost of capital improvements and expenses in a fair return petition. An allowance shall be made for anticipated expenses that the Landlord intends to incur during the twenty-four month period following the date of a final Rent Program determination. This procedure should not be used for anticipated expenses for ordinary maintenance and repairs. The portion of any allowable rent increase attributable to the capital improvement and expense shall not go into effect until completion has been documented to the Rent Program.

Complete this table only if you are seeking preliminary approval for improvements you plan to complete within the next twenty-four (24) months. A rent increase cannot be granted until the improvements are completed and documentation of the cost of the improvements has been reviewed and approved by the City.

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)
Item #	Brief Description and Expected Date of Completion	# of Units Impacted	Initial Cost	Interest Rate Allowed*	Amortization Period (years)*	Interest Amount	Total Cost [Principal + Interest]	Annual Cost	Monthly Cost	Monthly Cost Per Unit
_____	_____	_____	\$ _____	_____ %	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	_____ %	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	_____ %	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	_____ %	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	_____ %	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

*Use the amortization table in this Attachment and the information about interest rates.

Proposed Capital Expenses [add amounts in column (d)]: \$ _____

Annual Cost for Proposed Capital Expenses [add amounts in column (i)]: \$ _____

XV. Net Operating Income (NOI)

Net Operating Income = Income – Operating Expenses

	Base Year (2020)	Current May '24 - April '25
1. Total Annual Income	\$ _____	\$ _____
2. Annual Operating Expenses	\$ _____	\$ _____
3. Net Annual Operating Income	\$ _____	\$ _____
4. CPI [Annual Average CPI]	\$1148.40 2.2%	\$1468.50 2.5%
5. Percent Annual Increase in CPI Base Year to Current Year		_____ %
	$\frac{\text{Line 4 Current Year} - \text{Line 4 Base Year}}{\text{Line 4 Base Year}} \times 100$	
6. Fair Net Annual Operating Income = Base Year Net Operating Income Adjusted by CPI Increase		\$ _____
	$\frac{\text{Line 5} + 100}{100} \times \text{Line 3 Base Year}$	
7. Fair Net Annual Operating Income Minus Current Net Operating Income = Allowable Rent Increase		\$ _____
	$\text{Line 6} - \text{Line 3 Current Year}$	
8. Allowable Rent Increase/Unit/Month ³		\$ _____
	$\text{Line 7} \div 12 \div \# \text{ of Units}$	

³ If applied equally per unit. The Landlord may propose to allocate using a different rational basis. To detail a different allocation, complete XVIII Proposed Adjustment Worksheet.

XVI. Monthly Rent Worksheet

List the monthly rent, including all fees, charged each tenant, for the twelve (12) months preceding the date of the petition. If the rent was raised during the twelve-month period preceding the petition, including the amount of any fees, list each rent charged and indicate the date each raise was implemented. Provide the year and amount of any unused (banked) Annual Increase Percentage (AIP), Tax Rate Rent Adjustment (prior to 2023), or New Tenancy, or any other rent increase authorized by the Rent Board that have been banked with proper notice to each tenant for future rent increases.

Unit #	Rent	AIP & New Tenant Increase	Date of Increase	AIP & New Tenant Taken (%)	AIP & New Tenant Deferred (%)	Other Charges (Please specify)	Comment
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____

_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____

XVII. Proposed Adjustment Worksheet

Use the worksheet below to document current and proposed rents on a per-unit basis. MNOI increases should be distributed on a per capita basis or proportionally to the square footage or costs and expenses attributed to each unit.

Indicate method of allocation: **\$257 Per Capita basis: Unit #1 on July 2nd, Unit #2 May 2026, Unit #3 \$1905 on July 2nd**

Unit #	Base Period Rent Year (2019)	Date Tenancy Commenced (mm/dd/yyyy)	Initial Rent of Current Tenant/s	Date of Last Rent Increase (mm/dd/yyyy)	Rent used in Current Year Income Calculation	Rent as of Date Petition Submitted	Proposed Rent
___	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
___	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
___	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
___	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
___	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
___	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
___	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
___	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
___	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____

_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____

XVIII. CLAIM FOR ADJUSTMENT OF BASE YEAR NET OPERATING INCOME AND ASSOCIATED RENT ADJUSTED CLAIM

The ordinance dictates that the Rent Board must presume the net operating income the landlord earned from a covered unit during calendar year 2019 yielded a fair return on investment, unless the landlord proves that special or peculiar circumstances prevented the landlord from receiving a fair return on investment during that period. **Complete this Section XIX and the following Sections XX and XXI only if you are seeking an adjustment in base rent due to special or peculiar circumstances.**

Check the factors below that are applicable to your claim.

- A. Exceptional Expenses in the Base Year. The landlord's operating expenses in the base year were unusually high or low in comparison to other years. In such instances, adjustments may be made in calculating operating expenses in order that the base year operating expenses reflect average expenses for the property over a reasonable period of time. Check which factor(s) contributed to your claim:
 - a. Extraordinary amounts were expended for necessary maintenance and repairs
 - b. Maintenance and repair expenditures were exceptionally low as to cause inadequate maintenance or significant deterioration in the quality of services provide
 - c. Other expenses were unreasonably high or low notwithstanding the application of prudent business practices.
- ☒ B. Exceptional Circumstances in the Base Year. The gross income during the base year was disproportionately low due to exceptional circumstances. In such instances, adjustments may be made in calculating base year gross rental income consistent with the purpose of analyzing base year net operating income. Check which factor(s) contributed to your claim:
 - ☒ a. The gross income during the base year was lower than it might have been because some residents were charged reduced rent.
 - b. The gross income during the base year was significantly lower than normal because of the destruction of the premises and/or temporary relocation for construction or repairs.
 - c. The pattern of rent increases in the years prior to the base year were less than increases in the CPI.
- C. Other exceptional circumstances: (specify)

If the Rent Board determines that one or more of the above circumstances apply, the calculation of MNOI in Section XX will be performed with an Adjusted Gross Income, and that will be substituted for the Section XVI calculations. This figure represents the income that would have been expected absent the exceptional circumstances. Options for determining Adjusted Gross Income include, but are not limited to:

- ☒ A. Base year rents charged for any comparable units in the same building. **\$1500**
- B. The FY 2019 Fair Market Rents for Portland, ME, reported by the US Department of Housing:⁴

Efficiency	One-Bedroom	Two-Bedroom	Three-Bedroom	Four-Bedroom
\$989	\$1,071	\$1,387	\$1,829	\$2,198

⁴ These values do not include the cost of utilities. If using these numbers, do not include the cost of utilities in the base year when completing the expense portion of the worksheet.

- C. An appraisal of comparable fair market rental values as of 2019 for units similar to the units that are the subject of this application which has been prepared by a Maine licensed appraiser and is attached to this application.

Actual Gross Income for 2019: \$ _____

Proposed Adjusted Gross Income for 2019: \$ _____

Briefly describe the method for obtaining the proposed income and attach any relevant documentation in support of the claim for an adjustment of base year rent.

XIX. Income and Operating Expense Worksheet With Adjustment of Base Year

Base Year **2020**

Current Year **May '24 - April '25**

Rental Income

1. Adjusted Gross Income (with Adjusted Base Year as proposed in Section XIX) \$ _____ \$ _____

2. Portion Attributable to Vacancy \$ _____ \$ _____

Fees (indicate what fee is for):

3. Late fees \$ _____ \$ _____

4. List fees, other than utilities, collected for services & amenities not included in rent \$ _____ \$ _____

5. _____ \$ _____ \$ _____

6. _____ \$ _____ \$ _____

7. _____ \$ _____ \$ _____

Other Income (list separately by type)⁵:

8. _____ \$ _____ \$ _____

9. _____ \$ _____ \$ _____

10. _____ \$ _____ \$ _____

Fees charged by landlord for Utilities

11. Gas \$ _____ \$ _____

12. Electricity \$ _____ \$ _____

13. Water \$ _____ \$ _____

14. Sewer \$ _____ \$ _____

15. Garbage & Recycling \$ _____ \$ _____

Other Utilities (list separately by type):

16. _____ \$ _____ \$ _____

17. _____ \$ _____ \$ _____

18. TOTAL INCOME \$ _____ \$ _____

(add only lines 1 and 3-17)

⁵ Interest earned by Landlord on Tenant security deposits, other interest or investment income.

XX. Calculation of Fair Return Rent Adjustment with Adjustments of Base Year Amount

Complete only if seeking an adjustment of base year rent.

	Base Year (2019)	Current Year (2024)
1. Total Annual Income	\$ _____	\$ _____
2. Annual Operating Expenses	\$ _____	\$ _____
3. Net Annual Operating Income	\$ _____	\$ _____
4. CPI [Annual Average CPI]	2.2	2.5
5. Percent Annual Increase in CPI Base Year to Current Year		_____ %
	$\frac{\text{Line 4 Current Year}-\text{Line 4 Base Year}}{\text{Line 4 Base Year}} \times 100$	
6. Fair Net Annual Operating Income = Base Year Net Operating Income Adjusted by CPI Increase		\$ _____
	$\frac{\text{Line 5} + 100}{100} \times \text{Line 3 Base Year}$	
7. Fair Net Annual Operating Income Minus Current Net Operating Income = Allowable Rent Increase		\$ _____
	$\text{Line 6} - \text{Line 3 Current Year}$	
8. Allowable Rent Increase/Unit/Month ⁶		\$ _____
	$\text{Line 7} \div 12 \div \# \text{ of Units}$	

⁶ If applied equally per unit. The Landlord may propose to allocate using a different rational basis. To detail a different allocation, complete XVIII Proposed Adjustment Worksheet.

XXI. Other Claims

Explain any other claims in support of this application and provide/attach any evidence in support of those claims. Please use additional pages as appropriate:

XXII. Documentation of Current Year Income & Operating Expenses

1. Organize documents by operating expense category.
2. Number each page, submitted with this Application, with the number of the Expense Category (for instance on page 7, category of Landscape Maintenance is on line 16, any documents supporting that line item would be marked p.7, 16-1, p. 7 16-2, p. 7 16-3 and so on).

XXIII. Current Tenant Information

If there are more than four affected tenants, attach additional sheet(s).

Tenant's Name   _____
First Last Unit number
Mailing address if different _____ Email address 

Tenant's Name   _____
First Last Unit number
Mailing address if different _____ Email address 

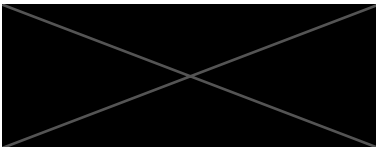
Tenant's Name   _____
First Last Unit number
Mailing address if different _____ Email address: 

Tenant's Name   _____
First Last Unit number
Mailing address if different _____ Email address 

XXIV. Certification

I hereby certify that the information provided is accurate to the best of my knowledge, request that any required notices be given and ask that a hearing be scheduled in front of the Rent Board to process this request for a rent increase as outlined above.

Signature of Applicant Landlord:

 _____  _____ _____
Printed name Signature Date



9 POWSLAND ST PORTLAND
Account Number Ending in: 7873
May 16, 2024 - June 3, 2024

TD BUSINESS SOLUTIONS VISA® CARD

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Transactions					
Activity Date	Post Date	Reference Number	Description		Amount
Card Number Ending in: 7873					
May 16	May 17	92348150	LOWES #01946* PORTLAND ME		275.09
May 18	May 20	23558732	LOWES #01946* PORTLAND ME		203.64
May 20	May 21	48758870	LOWES #01946* PORTLAND ME		105.46
May 21	May 22	39939616	Rewards Statement Credit		250.00 CR
May 22	May 24	01248475	LOWES #01946* PORTLAND ME		175.76
May 23	May 24	47004739	MAINE HDWE PORTLAND ME		217.10
May 24	May 27	48002194	MAINE HDWE PORTLAND ME		392.30
May 26	May 28	08708035	THE HOME DEPOT #2401 PORTLAND ME		111.44
May 27	May 28	46058584	ANANIAS CONGRESS PORTLAND ME		40.73
May 27	May 28	42001652	MAINE HDWE PORTLAND ME		19.09
May 29	May 31	59825531	LOWES #01946* PORTLAND ME		443.66
Jun 01	Jun 03	03523844	THE HOME DEPOT #2401 PORTLAND ME		144.42
Card Number Ending in: 1554					
May 16	May 17	15208073	SQ *GLAUDE AND SON SCARBOROUGH ME		465.00
May 17	May 20	34721175	LOWES #01946* PORTLAND ME		241.57
May 17	May 20	34931798	HARBOR FREIGHT TOOLS 478 SOUTH PORTLANME		241.46
May 17	May 20	34931848	HARBOR FREIGHT TOOLS 478 SOUTH PORTLANME		65.39
May 18	May 20	23558724	LOWES #01946* PORTLAND ME		3,369.72
May 20	May 21	15836714	HARBOR FREIGHT TOOLS 478 SOUTH PORTLANME		99.09
May 21	May 22	80713980	LOWES #01946* PORTLAND ME		95.82
May 21	May 22	53350736	SQ *GLAUDE AND SON SCARBOROUGH ME		275.00
May 22	May 23	23490961	NEXT INSUR* TOOLS		146.84
May 22	May 23	23490904	WWW.NEXTINSURCA		439.33
May 22	May 23	84407305	NEXT INSUR* GEN LIAB		
May 22	May 23	84407305	WWW.NEXTINSURCA		150.00
May 23	May 24	84674872	SQ *GLAUDE AND SON SCARBOROUGH ME		
May 23	May 24	84674872	LOWES #01946* PORTLAND ME		296.15 CR
May 23	May 24	96323652	LOWES #01946* PORTLAND ME		55.70
May 23	May 24	96323660	LOWES #01946* PORTLAND ME		66.17
May 23	May 24	96323678	LOWES #01946* PORTLAND ME		481.86
May 23	May 24	85063698	LOWES #01946* PORTLAND ME		971.02
May 23	May 24	88000520	WESTBROOK MARKET WESTBROOK ME		28.58
May 23	May 24	95964447	EXXON CONGRESS STREET PORTLAND ME		50.03
May 24	May 27	43223531	LOWES #01946* PORTLAND ME		51.59
May 24	May 27	43223549	LOWES #01946* PORTLAND ME		465.25
May 24	May 27	21958268	LOWES #01946* PORTLAND ME		30.30
May 24	May 27	21958276	LOWES #01946* PORTLAND ME		55.70
May 26	May 28	39346299	LOWES #01946* PORTLAND ME		21.06
May 26	May 28	39346307	LOWES #01946* PORTLAND ME		236.93
May 26	May 28	39346364	LOWES #01946* PORTLAND ME		42.75
May 26	May 28	39346372	LOWES #01946* PORTLAND ME		69.25
May 26	May 28	39346880	LOWES #01946* PORTLAND ME		69.12 CR
May 28	May 29	27595226	LOWES #01946* PORTLAND ME		149.45
May 28	May 29	38400130	HANDYMAN EQUIP RENTALS 207-6676000 ME		134.70
May 28	May 29	38400176	HANDYMAN EQUIP RENTALS PORTLAND ME		27.50 CR

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Transactions					
Activity Date	Post Date	Reference Number	Description		Amount
May 28	May 29	38400189	HANDYMAN EQUIP RENTALS 207-6676000 ME		46.20
Fees					
TOTAL FEES FOR THIS PERIOD					\$0.00
Interest Charged					
TOTAL INTEREST FOR THIS PERIOD					\$0.00

2024 Totals Year to Date	
Total fees charged in 2024	\$0.00
Total interest charged in 2024	\$0.00

Interest Charge Calculation			
Your Annual Percentage Rate (APR) is the annual interest rate on your account.			
Type of Balance	Annual Percentage Rate (APR)	Balances Subject to Interest Rate	Interest Charge
Purchases	29.24% (v)	\$0.00	\$0.00
Cash	30.49% (v)	\$0.00	\$0.00
(v) = Variable Rate			



9 POWSLAND ST PORTLAND
Account Number Ending in: 7873
June 4, 2024 - July 3, 2024

TD BUSINESS SOLUTIONS VISA® CARD

Page 3 of 4

Transactions					
Activity Date	Post Date	Reference Number	Description		Amount
Card Number Ending in: 7873					
Jun 10	Jun 11	85258368	LOWES #01946* PORTLAND ME		9.47
Jun 10	Jun 11	85258785	LOWES #01946* PORTLAND ME		208.81 CR
Jun 20	Jun 24	05773162	THE HOME DEPOT #2406 PORTLAND ME		2,399.33
Jun 25	Jun 26	51339596	COSTCO WHSE #1657 SCARBOROUGH ME		296.42
Jun 25	Jun 26	90856321	MAINE HDWE PORTLAND ME		37.85
Jun 26	Jun 26	00053687	PAYMENT RECEIVED - THANK YOU		10,160.07 CR
Jun 30	Jul 01	03646856	MAINE HDWE PORTLAND ME		335.88
Card Number Ending in: 1554					
Jun 03	Jun 04	58479888	LOWES #01946* PORTLAND ME		2,029.83 CR
Jun 06	Jun 10	31544775	LOWES #01946* PORTLAND ME		364.90 CR
Jun 07	Jun 10	30605693	LOWES #01946* PORTLAND ME		23.67
Jun 07	Jun 10	42836744	LOWES #01946* PORTLAND ME		92.62 CR
Jun 07	Jun 10	42400254	ECOMAINE-SCALE HOUSE PORTLAND ME		35.00
Jun 07	Jun 10	42400395	ECOMAINE-SCALE HOUSE PORTLAND ME		35.00
Jun 07	Jun 10	83536591	RIVERSIDE RECYCLING PORTLAND ME		25.00
Jun 22	Jun 24	11991881	NEXT INSUR. TOOLS		73.42
Jun 22	Jun 24	15480725	WWW.NEXTINSURCA		223.66
Jun 22	Jun 24	15480725	NEXT INSUR. GEN LIAB		
Jun 22	Jun 24	15480725	WWW.NEXTINSURCA		
Fees					
TOTAL FEES FOR THIS PERIOD					\$0.00
Interest Charged					
TOTAL INTEREST FOR THIS PERIOD					\$0.00

2024 Totals Year to Date	
Total fees charged in 2024	\$0.00
Total interest charged in 2024	\$0.00

Interest Charge Calculation			
Your Annual Percentage Rate (APR) is the annual interest rate on your account.			
Type of Balance	Annual Percentage Rate (APR)	Balances Subject to Interest Rate	Interest Charge
Purchases	29.24% (v)	\$0.00	\$0.00
Cash	30.49% (v)	\$0.00	\$0.00
(v) = Variable Rate			



America's Most Convenient Bank®

T

STATEMENT OF ACCOUNT



Go paperless.

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statements.

9 POWSLAND STREET PORTLAND LLC
62 PORTLAND RD STE 25A
KENNEBUNK ME 04043

Page:

Statement Period:

May 25 2024-Jun 2

Cust Ref #:

24

Primary Account #:

242

TD Business Convenience Plus

9 POWSLAND STREET PORTLAND LLC

Account # 242-9

ACCOUNT SUMMARY

Beginning Balance	17,700.00	Average Collected Balance	19,826.67
Deposits	3,000.00	Interest Earned This Period	0.00
Electronic Deposits	5,057.00	Interest Paid Year-to-Date	0.00
		Annual Percentage Yield Earned	0.00%
Electronic Payments	4,490.00	Days in Period	31
Ending Balance	21,267.00		

	Total for this cycle	Total Year to Date
Grace Period OD/NSF Refund	\$0.00	\$0.00

DAILY ACCOUNT ACTIVITY

Deposits

POSTING DATE	DESCRIPTION	AMOUNT
06/06	MOBILE DEPOSIT	3,000.00
Subtotal:		3,000.00

Electronic Deposits

POSTING DATE	DESCRIPTION	AMOUNT
06/04	eTransfer Credit, Online Xfer Transfer from CK 00211	1,637.00
06/07	eTransfer Credit, Online Xfer Transfer from CK 00211	3,000.00
06/24	eTransfer Credit, Online Xfer Transfer from CK 002117	420.00
Subtotal:		5,057.00

Electronic Payments

POSTING DATE	DESCRIPTION	AMOUNT
06/03	eTransfer Debit, Online Xfer Transfer to CK 2429606	300.00
06/06	eTransfer Debit, Online Xfer Transfer to CK 002117	3,000.00
06/10	ELECTRONIC PMT-WEB, VENMO PAYMENT 103491	500.00
06/10	ELECTRONIC PMT-WEB, VENMO PAYMENT 103493	200.00
06/14	ELECTRONIC PMT-WEB, VENMO PAYMENT 10350175	70.00
06/20	TDBANK BILL PAY CHECK, SPRAGUES LAWN CARE CHECK# 995001	420.00
Subtotal:		4,490.00

Fence



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E

STATEMENT OF ACCOUNT

9 POWSLAND STREET PORTLAND LLC
62 PORTLAND RD STE 25A
KENNEBUNK ME 04043

Page: 1 of 3
Statement Period: Oct 25 2024-Nov 24 2024
Cust Ref #: [REDACTED]-717-E-***
Primary Account #: [REDACTED]

TD Business Convenience Plus

9 POWSLAND STREET PORTLAND LLC

Account # 242-[REDACTED]

ACCOUNT SUMMARY

Beginning Balance	8,883.13	Average Collected Balance	4,245.03
Deposits	1,500.00	Interest Earned This Period	0.00
Electronic Deposits	2,747.00	Interest Paid Year-to-Date	0.00
		Annual Percentage Yield Earned	0.00%
Electronic Payments	10,714.86	Days in Period	31
Ending Balance	2,415.27		

	Total for this cycle	Total Year to Date
Grace Period OD/NSF Refund	\$0.00	\$0.00

DAILY ACCOUNT ACTIVITY

Deposits

POSTING DATE	DESCRIPTION	AMOUNT
11/04	MOBILE DEPOSIT	1,500.00
	Subtotal:	1,500.00

Electronic Deposits

POSTING DATE	DESCRIPTION	AMOUNT
11/01	eTransfer Credit, Online Xfer Transfer from CK 242930 [REDACTED]	1,000.00
11/04	ACH DEPOSIT, VENMO CASHOUT 1037963 [REDACTED]	1,637.00
11/21	eTransfer Credit, Online Xfer Transfer from CK 0021 [REDACTED]	110.00
	Subtotal:	2,747.00

Electronic Payments

POSTING DATE	DESCRIPTION	AMOUNT
10/30	eTransfer Debit, Online Xfer Transfer to CK 0021 [REDACTED]	2,000.00
10/30	eTransfer Debit, Online Xfer Transfer to CC 48473834 [REDACTED]	1,592.26
11/01	TD BILL PAY SERV, CENLAR MORTGAGE ONLINE PMT TDB66 [REDACTED]	4,400.00
11/01	ACH DEBIT, FIDIUM FIBER BILLPAY FIDIUM NNE PMTS	85.03
11/12	ELECTRONIC PMT-WEB, VENMO PAYMENT 10381174 [REDACTED]	2,000.00
11/12	eTransfer Debit, Online Xfer Transfer to CC [REDACTED]	367.57

Porch



Bank

America's Most Convenient Bank®

STATEMENT OF ACCOUNT

9 POWSLAND STREET PORTLAND LLC

Page: 3 of 3
Statement Period: Jun 25 2024-Jul 24 2024
Cust Ref #: 2429719519-717-T-###
Primary Account #: 242-9719-####

DAILY ACCOUNT ACTIVITY

Electronic Payments (continued)

POSTING DATE	DESCRIPTION	AMOUNT
07/18	DBCRD PUR AP, AUT 071624 VISA DDA PUR AP DRUMMOND DRUMMOND LLP 207 7740317 * ME 4387651001	303.75
07/18	ELECTRONIC PMT-WEB, FIDIUM FIBER BILLPAY FIDIUM NNE PMTS	185.80
07/19	ACH DEBIT, HARLAND CLARKE CHK ORDERS 1709510603	45.00
07/22	ELECTRONIC PMT-TEL, LOWES SYF PAYMNT 79819242052	924.74
07/22	ELECTRONIC PMT-TEL, PORTLAND WATER UTILITY 86650	260.47
07/24	eTransfer Debit, Online Xfer Transfer to CC 4847383489817873	1,031.52
07/24	ELECTRONIC PMT-WEB, VENMO PAYMENT 10358359 Fence	550.00
Subtotal:		18,273.43

Other Withdrawals

POSTING DATE	DESCRIPTION	AMOUNT
07/02	DEBIT	1,500.00
07/16	DEBIT	200.00
Subtotal:		1,700.00

Service Charges

POSTING DATE	DESCRIPTION	AMOUNT
07/24	PAPER STATEMENT FEE	3.00
Subtotal:		3.00

DAILY BALANCE SUMMARY

DATE	BALANCE	DATE	BALANCE
06/24	21,267.00	07/11	7,931.85
06/26	20,892.00	07/16	7,731.85
06/27	10,731.93	07/18	7,242.30
06/28	6,406.44	07/19	7,197.30
07/02	6,543.44	07/22	1,012.09
07/09	8,043.44	07/24	9,427.57

9 POWSLAND STREET PORTLAND LLC

STATEMENT OF ACCOUNT

Page: 4 of 4
Statement Period: Sep 25 2024-Oct 24 2024
Cust Ref #: 19-717-E-***
Primary Account #: 24

9 POWSLAND STREET PORTLAND LLC
137 NOYES ST
PORTLAND, ME, 04103

144
92-7445/2112
19

Sept 26/24
Date

Pay to the Order of Troy Beaulieu \$ 3,363
Three thousand three hundred sixty three and no/100 Dollars

TD Bank
America's Most Convenient Bank®

For [Redacted]

#144 09/26 \$3,363.00

9 POWSLAND STREET PORTLAND LLC
137 NOYES ST
PORTLAND, ME, 04103

146
92-7445/2112
19

Oct 15/24
Date

Pay to the Order of Beaulieu Builders \$ 20,000
Twenty thousand dollars and no/100

TD Bank
America's Most Convenient Bank®

For [Redacted]

#146 10/16 \$20,000.00

Porches

9 POWSLAND STREET PORTLAND LLC

STATEMENT OF ACCOUNT

Page: 3 of 4
Statement Period: Sep 25 2024-Oct 24 2024
Cust Ref #: 242 19-7-E-***
Primary Account #: 24

DAILY ACCOUNT ACTIVITY

Electronic Payments

POSTING DATE	DESCRIPTION	AMOUNT
09/25	ELECTRONIC PMT-WEB, FIDIU FIBER BILLPAY FIDIU NNE PMTS	155.00
10/03	TD BILL PAY SERV, CENLAR MORTGAGE ONLINE PMT TDB6697 [Redacted]	4,400.00
10/23	ELECTRONIC PMT-WEB, VENMO PAYMENT 103773543 [Redacted]	620.00
10/23	ELECTRONIC PMT-WEB, VENMO PAYMENT 10377357 [Redacted]	200.00
Subtotal:		5,375.00

DAILY BALANCE SUMMARY

BALANCE
3,000.00

9 POWSLAND STREET PORTLAND LLC

STATEMENT OF ACCOUNT

Page: 4 of 4
Statement Period: Nov 25 2024-Dec 24 2024
Cust Ref #: 24297 [Redacted]
Primary Account #: 24

9 POWSLAND STREET PORTLAND LLC
137 NOYES ST
PORTLAND, ME, 04103

102
92-7445/2113
19

12/3/24
Date

Pay to the Order of Troy Beaulieu \$ 5,000
Five thousand dollars and no/100

TD Bank
America's Most Convenient Bank®

For Deck [Redacted]

#102 12/05 \$5,000.00

Porches

**CITY OF PORTLAND**389 CONGRESS ST
PORTLAND, ME 04101

For the fiscal year July 01, 2024 to June 30, 2025

BILL #: 2512098
ACCOUNT #: 104512
PARCEL ID #: 190-J-003-001
LOCATION: 9 POWSLAND ST

CURRENT BILL RATE DISTRIBUTION		
SCHOOL	7.880	\$4,265.44
COUNTY	0.560	\$303.13
MUNICIPAL	6.570	\$3,556.34
TOTAL	15.010	\$8,124.91

**THIS IS THE ONLY BILL
YOU WILL RECEIVE****FY25 REAL ESTATE TAX BILL**

BILLING INFORMATION	
LAND VALUE	\$77,400
BUILDING VALUE	\$463,900
TOTAL VALUE	\$541,300
EXEMPTIONS	\$0
TAXABLE VALUE	\$541,300
TAX RATE	15.010
TOTAL TAX	\$8,124.91
PAYMENTS/CREDITS	\$0.00
ABATEMENT/ADJUST	\$0.00
TAX DUE	\$8,124.91

DATE DUE	AMOUNT DUE
10/18/2024	\$4,062.46
03/14/2025	\$4,062.45



Assessed Property Description:

190-J-3
POWSLAND ST 95500 SF
Acres: 0.126

Owner of Record as of: April 1, 2024

**INTEREST AT 8% PER ANNUM CHARGED BEGINNING 10/19/2024 AND 03/15/2025.****TAXPAYER'S NOTICE**Per State law, the ownership and valuation of all real estate and personal property subject to taxation shall be fixed as of April 1st.
For this tax bill, that date is April 1, 2024.**IF THIS PROPERTY HAS BEEN TRANSFERRED, PLEASE FORWARD A COPY OF THIS BILL TO THE NEW OWNER.
THIS IS ONLY FOR THE CURRENT FISCAL YEAR****INFORMATION****Without State Aid for Education, Homestead and BETE Exemption Reimbursement and State Revenue Sharing, your taxes would be 15.7% higher. The current City and School bonded indebtedness is \$374,509,262.**
For information regarding changes or valuations, please contact the Assessor's Office at (207) 874-8486. Information regarding payments, interest, lien cost charges, and/or refunds, please contact the Treasury Office at (207) 874-8490.**REMITTANCE INSTRUCTIONS****THIS IS THE ONLY BILL YOU WILL RECEIVE. THIS BILL INCLUDES TWO (2) PAYMENT VOUCHERS.**

Please make check or money order payable to City of Portland and mail to:

**City of Portland Treasury
PO Box 16050
Lewiston, ME 04243-9533**For payments in person, please go to the Treasury Office located in Room 102 of City Hall.
If your bank or mortgage company pays your taxes, please review and forward a copy of this bill to them.**FY25 REAL ESTATE TAX BILL**THIS STUB MUST BE RETURNED WITH YOUR **SECOND** PAYMENT**CITY OF PORTLAND TREASURY
PO Box 16050
LEWISTON, ME 04243**BILL #: 2512098
ACCOUNT #: 108286
PARCEL ID #: 190-J-003-001INTEREST AT 8% CHARGED
BEGINNING 03/15/2025

DATE DUE	AMOUNT DUE
03/14/2025	\$4,062.45



AMOUNT PAID \$ _____

208202550251209812600004062451

☐ OWNER / ADDRESS CHANGE?
CHECK HERE AND NOTE CHANGES ON BACK.**FY25 REAL ESTATE TAX BILL**THIS STUB MUST BE RETURNED WITH YOUR **FIRST** PAYMENT**CITY OF PORTLAND TREASURY
PO Box 16050
LEWISTON, ME 04243**BILL #: 2512098
ACCOUNT #: 108286
PARCEL ID #: 190-J-003-001INTEREST AT 8% CHARGED
BEGINNING 10/19/2024

DATE DUE	AMOUNT DUE
10/18/2024	\$4,062.46



AMOUNT PAID \$ _____

208202550251209811800004062469

☐ OWNER / ADDRESS CHANGE?
CHECK HERE AND NOTE CHANGES ON BACK.

9 Powsland Street Portland LLC 2024 Capital Improvements				
	Improvements			acct#
5/16/24	\$ (1,000)	M paint supplies - fence Venmo		5783
5/16/24	\$ (500)	M fence advance Venmo		5783
5/17/24	\$ (275)	Lowe's		
5/20/24	\$ (204)	Lowe's		
5/20/24	\$ (242)	Lowe's		
5/21/24	\$ (200)	M fence Venmo		5783
5/29/24	\$ (135)	Handyman Equip Rentals		
5/29/24	\$ (46)	Handyman Equip Rentals		
5/31/24	\$ (1,500)	M fence Venmo		5783
6/8/24	\$ (1,500)	B driveway		
6/8/24	\$ (500)	Mv fence Venmo		9519
6/10/24	\$ (200)	M fence Venmo		9519
6/14/24	\$ (70)	M fence Venmo		9519
6/24/24	\$ (2,399)	The Home Depot		
7/22/24	\$ (5,000)	Deck		Check #141
7/24/24	\$ (550)	M fence Venmo		9519
8/17/2024	\$ (800)	Decks eng. dep. T via K Venmo		5783
9/25/2024	\$ (2,000)	Decks design T via KBC Venmo		5783
9/26/2024	\$ (3,363)	Decks		
10/16/2024	\$ (20,000)	Decks		
10/22/2024	\$ (620)	Windows N Venmo		9519
10/29/24	\$ (2,000)	Decks T via KBC Venmo		5783
11/8/24	\$ (2,000)	Porch T Venmo		9519
12/5/2024	\$ (5,000)	T Deck		
	Improvements			
	\$ (50,104)			

June 8, 2024

557484

Invoice

RLM

SOLD TO <i>Kondra Danse</i>		SHIP TO	
ADDRESS <i>9 Powslen St</i>		ADDRESS	
CITY, STATE, ZIP <i>Portland Me</i>		CITY, STATE, ZIP	
CUSTOMER ORDER NO.	SOLD BY	TERMS	F.O.B.
			DATE

ORDERED	SHIPPED	DESCRIPTION	PRICE	UNIT	AMOUNT
		<i>Driveway repair</i>			
		<i>Scraped down leveled Drive</i>			
		<i>spread 3 yards reclaim</i>			
		<i>leveled + smoothed out</i>			
		<i>materials</i>			<i>\$1000</i>
		<i>Labor</i>			<i>500</i>
		<i>Total</i>			<i>\$1500</i>



Builders

 Drive

(207) 

 maineexteriormangement.com

Portland, ME 04103

F: Fax Number

Website

Bill To: 9 Powsland LLC

Project: Deck Renova Invoice #: 2456

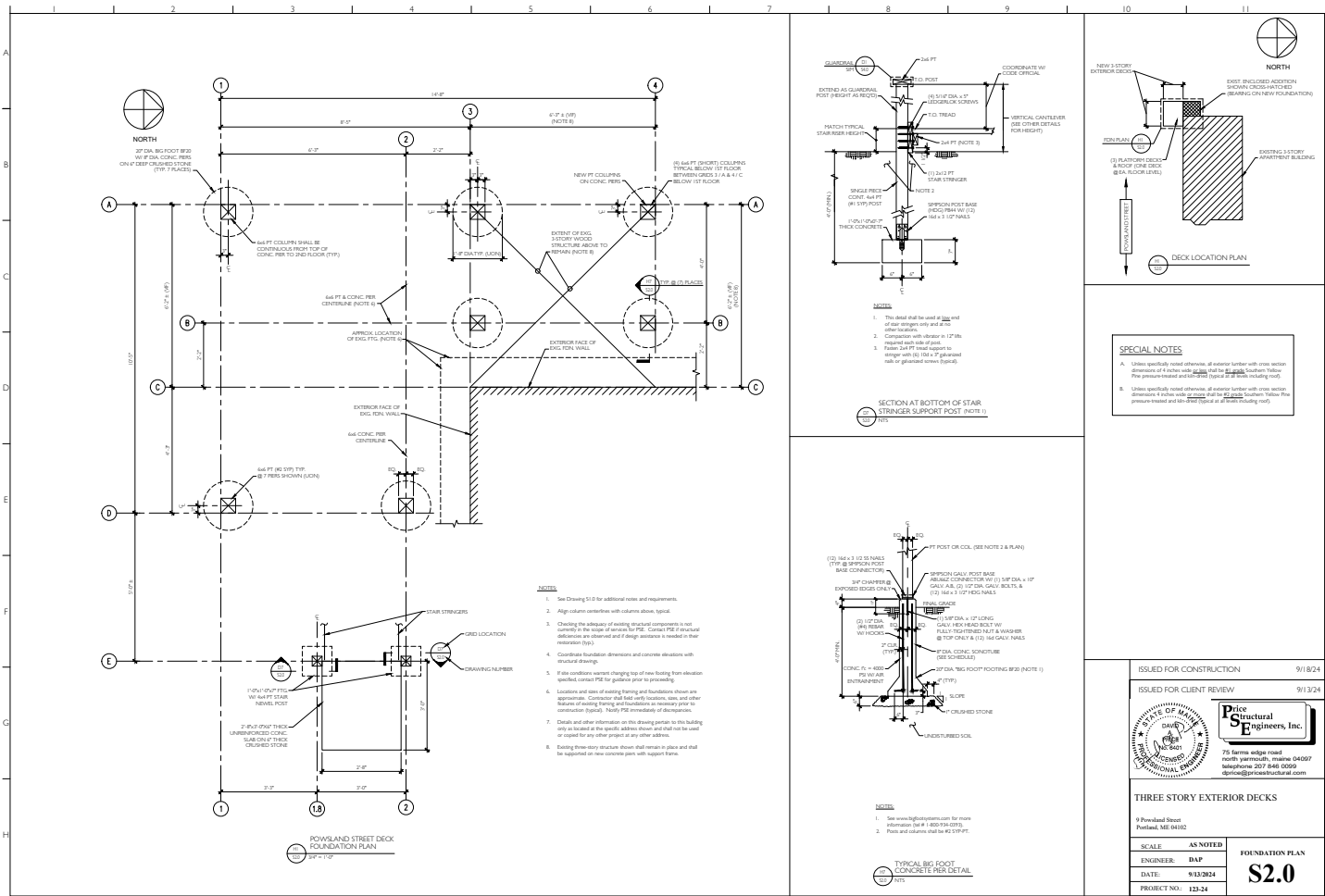
Address:  Portland, ME

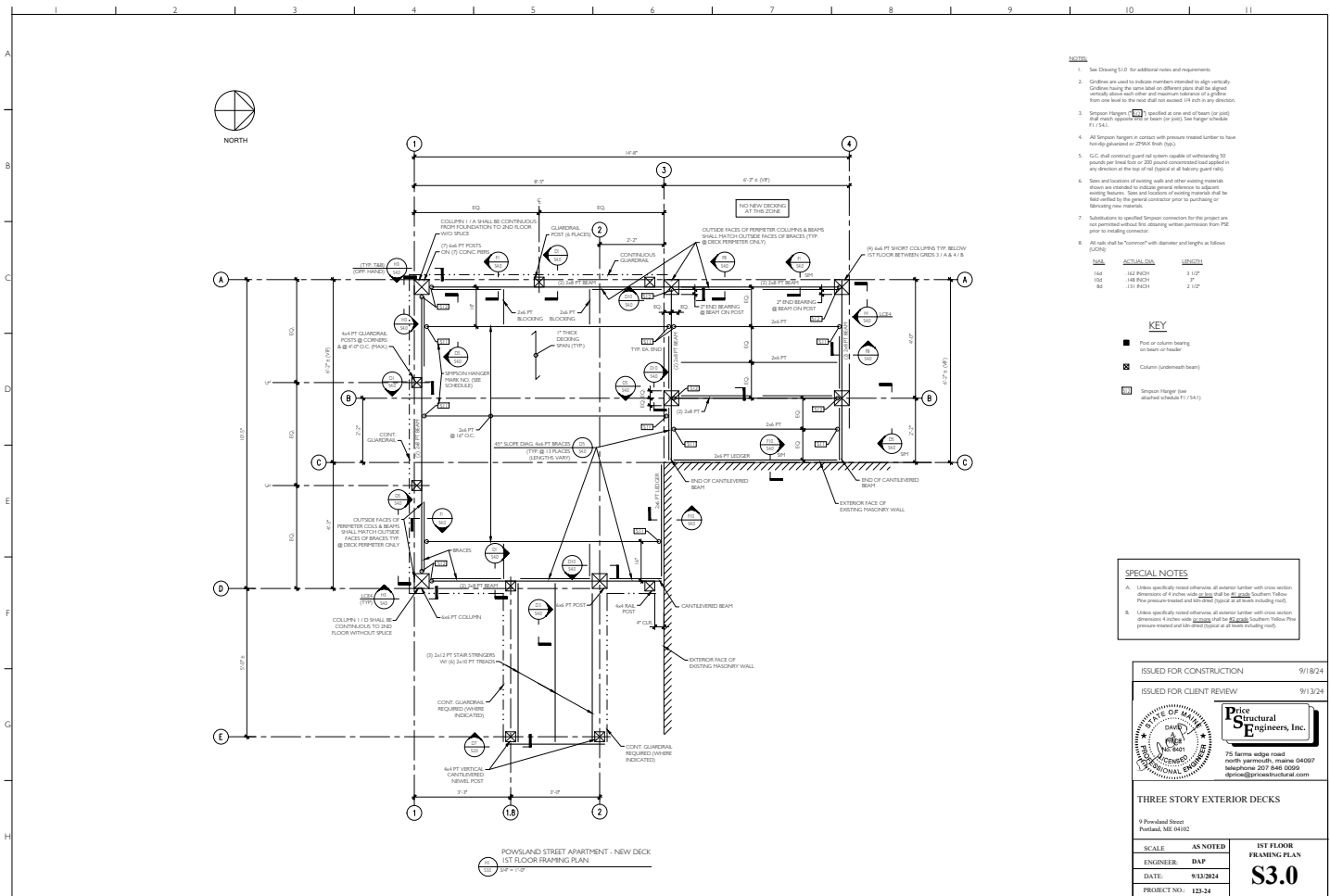
Invoice Date: 12/20/2024

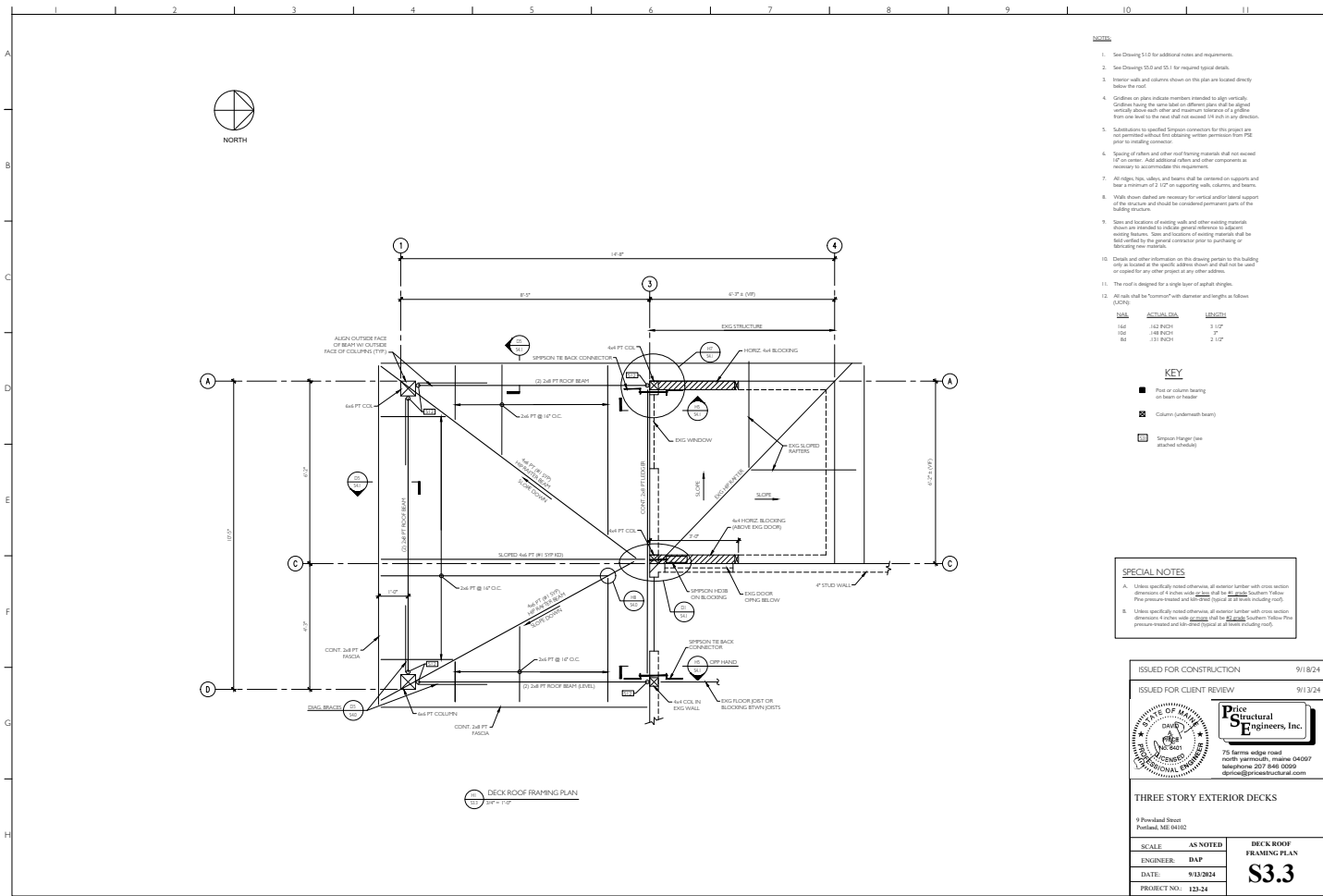
Invoice For: Yard and Fence

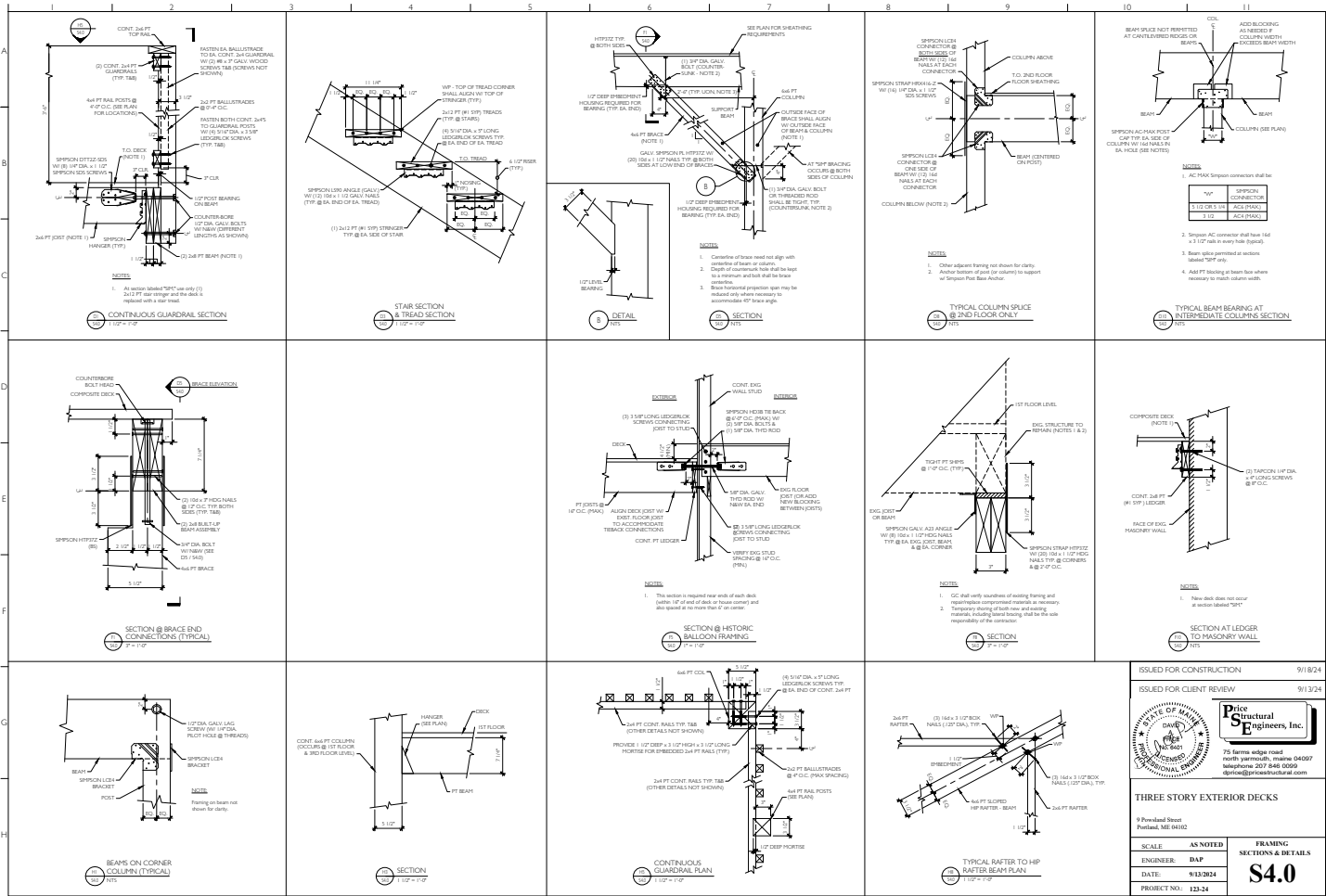
Item #	Description	Price	Percent Complete	Total
301	Grade lawn, install loam and Fence	\$ 3,925	100.00%	\$ 3,925.00
Paid in Full			TOTAL	\$ 3,925.00

ABBREVIATIONS









ISSUED FOR CONSTRUCTION 9/1/24

ISSUED FOR CLIENT REVIEW 9/1/24

Price Structural Engineers, Inc.

75 Sarma ridge road
north yarmouth, maine 04097
telephone 207 848 0099
dprice@pricestructural.com

THREE STORY EXTERIOR DECKS

3 Portland Street
Portland, ME 04102

SCALE	AS NOTED	FRAMING SECTIONS & DETAILS
DATE:	9/13/2024	S4.0
PROJECT NO.	123-24	



Builders



Drive

(207)



aineexteriormanagement.com

Portland, ME 04103

F: Fax Number

Website

Bill To: 9 Powsland LLC

Project: Deck Renova

Invoice #: 2455

Address:



Portland, ME

Invoice Date: 12/20/2024

Invoice For: Deck Renovation

Item #	Description	Price	Percent Complete	Total
301	Deck renovation per plans and specifications from Pierce Engineering (See Attached Drawings)	\$ 38,163	100.00%	\$ 38,163.00
Paid in Full			TOTAL	\$ 38,163.00

My Invoices

Invoices Shared With Me

Maine Registered Agent, Inc

☐	Company	Invoice Created	Due	Paid	Date Paid	Total	Invoice	States	Content	Action
☐	9 Powsland Street Portland LLC	Sep 27, 2024	Sep 27, 2024	Paid	Sep 27, 2024	\$15.00	7ZEW6C8	ME		View
☐	9 Powsland Street Portland LLC	Sep 27, 2024	Sep 27, 2024	Paid	Sep 27, 2024	\$15.00	263D83H6	ME		View
☐	9 Powsland Street Portland LLC	May 9, 2024	May 9, 2024	Paid	May 9, 2024	-\$9.00	3477DF6H			View
☐	9 Powsland Street Portland LLC	May 8, 2024	May 8, 2024	Paid	May 9, 2024	\$9.00	WD27A93F		FILING	View
☐	9 Powsland Street Portland LLC	May 8, 2024	May 8, 2024	Paid	May 8, 2024	- \$49.00	F8E6F7	FL		View
☐	9 Powsland Street Portland LLC	May 3, 2024	May 3, 2024	Paid	May 3, 2024	\$427.00	23H99FHC	FL, ME,	FILING, RA	View
☐	9 Powsland Street Portland LLC	May 3, 2024	May 3, 2024	Paid	May 3, 2024	\$58.00	659HWA	ME,	FILING, RA	View

Invoices



1050 Woodward Avenue | Detroit, MI 48226

Annual Escrow Account Disclosure Statement

1-810-69950-0004674-001-000-000-000-000

MICHAEL BOURQUE
KENDRA B CONNELLY



Loan Information

Loan Number: [REDACTED] 916
Property Address: 9 Powsland ST
Portland, ME 04102
Statement Date: 07/02/2025
New Payment
Effective Date: 08/01/2025

1. Your Escrow Account Has A Shortage

To take a closer look at your numbers, sign in to Rocket Mortgage® and click on the Loan Information tab.

Due to an increase in your taxes and/or insurance, your escrow account is short \$735.33.

Projected Escrow Account Balance

Projected Minimum Balance:	\$1,358.66
Required Minimum Balance:	\$2,093.99
Shortage Amount:	\$735.33

2. Here Are Your Options

Option A: Pay \$735.33 in full now. Your monthly escrow payment will decrease to \$1,047.00 to cover escrow expenses.

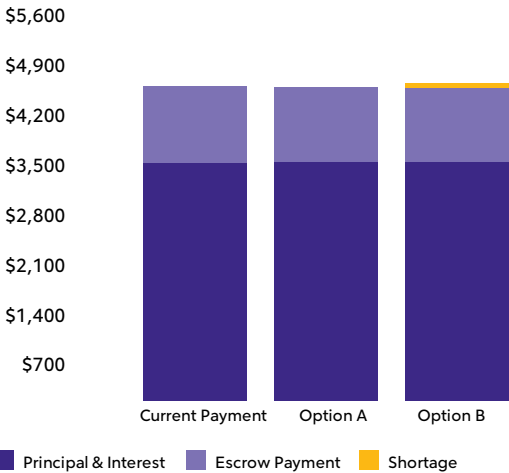
Option B: Pay \$61.28 each month over the next 12 months. Your monthly escrow payment will increase to \$1,108.28 to cover escrow expenses.

You Have A Decision To Make

	Current	Option A	Option B
Principal & Interest:	\$3,338.97	\$3,338.97	\$3,338.97
Escrow Payment:	\$1,067.76	\$1,047.00	\$1,047.00
Shortage:		\$0.00	\$61.28
Monthly Payment:	\$4,406.73	\$4,385.97	\$4,447.25

If you're enrolled in bill pay through your bank, please contact your bank to update your payment amount before your August 01, 2025, payment. To have your payment amount updated automatically in the future, sign up for autopay through Rocket Mortgage®.

Mortgage Payment Breakdown



Quick And Easy Payment Options

RocketMortgage.com

Rocket Mortgage® mobile app

24/7 access at (800) 508-0944

Send check payable to Rocket Mortgage, LLC, P.O. Box 6577, Carol Stream, IL 60197-6577

QL026

DETACH AND RETURN THIS PORTION WITH YOUR PAYMENT

MICHAEL BOURQUE
KENDRA B CONNELLY



☐ Check box for address changes on reverse side.

Loan Information

Loan Number: [REDACTED] 916
Amount Due: \$735.33
Due Date: 07/31/2025

Rocket Mortgage, LLC
P.O. Box 6577
Carol Stream, IL 60197-6577

Note: Escrow-Only Deposit

QL026
continued →
Page 1



1050 Woodward Avenue | Detroit, MI 48226

Annual Escrow Account
Disclosure Statement

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NEW CONTACT INFORMATION

Name: _____

Preferred Phone Number: ☐ Cell ☐ Home ☐ Work _____

Street Address: _____

City: _____ State: _____ ZIP: _____

Email 1: _____ Email 2: _____

Signature: _____

A signature is required to make address changes.

3. A Closer Look At Your Escrow Account History

The table below details the activity history for your escrow account from last year. Please keep in mind that the history will reflect the month in which the payment or disbursement was made. This may be different than the payment or disbursement due date.

Escrow Account Activity History For June 2025 To July 2025							
		Payments		Disbursements		Balance	
Date	Activity	Estimated	Actual	Estimated	Actual	Estimated	Actual
06/2025	Beginning Balance					\$0.00	\$0.00
06/2025	Deposit	\$0.00	\$3,306.36	\$0.00	\$0.00	\$0.00	\$3,306.36
07/2025	Deposit	\$0.00	\$1,067.76	\$0.00	\$0.00	\$0.00	\$4,374.12 **
Totals		\$0.00	\$4,374.12	\$0.00	\$0.00		

** This amount is a projection as of the date of this analysis. It has not been received or remitted at this time.

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4. A Closer Look At Projections For Your Escrow Account

Escrow Account Projection

Description	Annual Amount
CITY TAXES:	\$8,124.91
HOMEOWNERS INS:	\$4,439.00
Total Annual Taxes And Insurance:	\$12,563.91
New Monthly Escrow Payment:	\$1,047.00

The table below details the projected activity for your escrow account. The minimum required balance, highlighted in yellow, is determined by the Real Estate Settlement Procedures Act (RESPA), your mortgage contract or state law. Your account's selected minimum allowed balance or cushion is \$2,093.99. Your minimum required balance may include up to two months of escrow payments to cover increases in your taxes and insurance.

The actual amounts paid out for taxes and insurance, as shown in the Escrow Account Activity History Table, are used as the basis for our projections for the upcoming year.

Future Escrow Account Activity For August 2025 To July 2026

Date	Activity	Payments	Disbursements	Balance	
		Estimated	Estimated	Estimated	Required
08/2025	Beginning Balance			\$4,374.12	\$5,109.45
08/2025	Deposit	\$1,047.00	\$0.00	\$5,421.12	\$6,156.45
08/2025	Withdrawal - CITY TAXES	\$0.00	\$4,062.46	\$1,358.66	\$2,093.99 ^L
09/2025	Deposit	\$1,047.00	\$0.00	\$2,405.66	\$3,140.99
10/2025	Deposit	\$1,047.00	\$0.00	\$3,452.66	\$4,187.99
11/2025	Deposit	\$1,047.00	\$0.00	\$4,499.66	\$5,234.99
12/2025	Deposit	\$1,047.00	\$0.00	\$5,546.66	\$6,281.99
01/2026	Deposit	\$1,047.00	\$0.00	\$6,593.66	\$7,328.99
02/2026	Deposit	\$1,047.00	\$0.00	\$7,640.66	\$8,375.99
02/2026	Withdrawal - CITY TAXES	\$0.00	\$4,062.45	\$3,578.21	\$4,313.54
03/2026	Deposit	\$1,047.00	\$0.00	\$4,625.21	\$5,360.54
04/2026	Deposit	\$1,047.00	\$0.00	\$5,672.21	\$6,407.54
05/2026	Deposit	\$1,047.00	\$0.00	\$6,719.21	\$7,454.54
05/2026	Withdrawal - HOMEOWNERS INS	\$0.00	\$4,439.00	\$2,280.21	\$3,015.54
06/2026	Deposit	\$1,047.00	\$0.00	\$3,327.21	\$4,062.54
07/2026	Deposit	\$1,047.00	\$0.00	\$4,374.21	\$5,109.54
	Totals	\$12,564.00	\$12,563.91		

^LThis amount denotes the projected low point balance.

If you have an active bankruptcy or you received a bankruptcy discharge, we are sending this for informational or legal purposes only. We're not trying to collect against you personally. If you have any questions about this communication or your obligation to pay, please contact your attorney.

City of Portland – Housing Safety Division
LANDLORD APPLICATION FOR RENT INCREASE SUMMARY

Date of Hearing:

July 23, 2025

Owner Name and Address:

Matthew F. Davies
56 Marlu St
Westbrook, ME 04092

Agent Name and Address:

N/A

Property Address and Unit:

135 Sheridan St, Unit 102

CBL:

013-K-002-102

Tenants/Interested Parties:

No

**City of Portland Permitting and Inspections Department Landlord
Worksheet/Petition for Rent Board Approved Increase Rent Increase using
Fair Return Standard: Maintenance of Net Operating Income (MNOI)**

Note to Applicants

All information and documentation provided in this application will be made available to the public, pursuant to applicable public access laws in the State of Maine. An Applicant may choose to redact sensitive information contained herein, including, but not limited to bank account information, debit card or credit card information, government-issued identification information, personal contact information such as phone numbers, email addresses, tenant or employee names, or other personally identifying information. The Rent Board may act within its authority to request any additional information it deems pertinent to the application at hand.

Introductory Information

A landlord is entitled to a fair return on investment, which means an amount sufficient to allow a just and reasonable rate of return, to encourage the investment of capital in the rental housing market, to fairly compensate investors for the risks they have assumed, and to achieve minimum constitutionally protected standards.

Pursuant to the Rent Control Ordinance, the fair return on investment must be calculated using Maintenance of Net Operating Income (MNOI). This methodology presumes the net operating income the landlord earned from a Covered unit during the calendar year 2019 yielded a fair return on investment unless the landlord proves that special or peculiar circumstances prevented the landlord from receiving a fair return on investment during that period. To qualify for an MNOI increase, the landlord has to file this application for a hearing by the Rent Board.

1. **Presumption of Base Year Net Operating Income**
It shall be presumed that the net operating income received by the landlord during the calendar year 2019 (the Base Year) yielded a Fair Return on investment. This presumption may be rebutted, in which case an adjusted Base Year Net Operating Income shall be used.
2. **Fair Return**
A landlord has the right to obtain a net operating income equal to the Base Year (2019) net operating income adjusted by 100% of the percentage increase in the Consumer Price Index (CPI), since the Base Year. It shall be presumed this standard provides a Fair Return.
3. **Base Year:**
 - a. Calendar year 2019 is the Base Year.
 - b. In the event that a prior determination of the allowable Rent is made pursuant to a Fair Return petition, if a subsequent petition is filed, the Base Year shall be the year that was considered as the "current year" in the prior petition.
 - c. Unless otherwise exempted from the limitation on rent increases by local, state or federal laws or regulations, if a Rental Unit enters the marketplace for the first time after 2019, the Base Year shall be the year the Unit entered the marketplace.
4. **Current Year**
The "current year" shall be the calendar year preceding the petition.
5. **CPI (Consumer Price Index)**
The annual CPI for the current year for All Urban Consumers for the Greater Boston Metro area (All Urban Consumers, All Items) provided by the U.S. Bureau of Labor Statistics [[Bureau of Labor Statistics Data \(bls.gov\)](https://www.bls.gov)].
6. **Limits of Allowable Rent Increases in Any One Year**
If the amount of any rent increase granted pursuant to a fair return petition exceeds 10%, the portion in excess of 10% shall be deferred to the next year or years following the procedure for Banked Rent.

General Information About the Property

Street Address: 135 Sheridan Street, Unit 102, Portland, ME

Parcel Number(s): 013-K-002-102

Year Property Purchased by Current Owner: 2013

Total Number of Units on the Property: 1

Total Number of Units Affected by Proposed Rent Increase: 1

Are there Rental Units that are Partially or Fully Exempt (circle)? Yes ☐ No ☒

If yes, number of Exempt Rental Units and Basis for Exemption: None

I. Landlord Information

Name: Matthew F. Davies

Phone(s): (207) 749-8214

Business Address: 56 Marlu Street

City, State, Zip: Westbrook, ME 04092

Business E-mail: mdavies754@gmail.com

II. Agent Information (if applicable)

Name: N/A

Phone(s): _____

Business Address: _____

City, State, Zip: _____

Business E-mail: _____

III. Services

Please check the applicable box to identify the manner in which each service is paid.

	Paid by Landlord, but not passed through to Tenants	Tenants pay service directly	Landlord pays service and passes cost through to Tenants
Gas	☐	☒	☐
Electricity	☐	☒	☐
Water	☐	☐	☒
Sewer	☐	☐	☒
Garbage	☐	☐	☒
Other:	☐	☐	☒

IV.Changes to Services

Briefly describe the services provided to the rental units. Include all services provided and state which services are provided without additional charge.

Unit is included in the Condominium Associate of 135 Sheridan Street. The manager of 135 Sheridan Condominium Association allocates to each unit Manager/Management fees (Condo fees) monthly that include multiple items that are maintained by the Association. Included are costs related to upkeep, both exterior and interior of the building, water, sewer, and City of Portland Rainwater charges, among others. Costs are incurred for the building and common areas as a whole, estimated/budgeted for the year, and allocated/charged to all owners of each of the individual properties within the Association/Building based upon square footage. Costs for the "Condo" fees are paid by the owner (myself) and recouped by Rent charged to the tenant.

Unit is an approximately 850 Square Foot 1 Bedroom unfurnished condo unit at 135 Sheridan Street, Unit 102, Portland, originally purchased in mid 2013 and continuously used as a Rental Unit. Rent of \$1,600 was Initially charged and remained the same from mid 2013 to December 2021 (8.5 years). Significant updates are currently in progress and should be completed by July 1, 2025 - ready for new tenant.

If there have been any changes to the services listed above or in the responsibility for their payment since the base year, please explain:

Assessment of \$5,570 to my unit in 2019 (base year) by the Condo Association for repairs to building exterior. Not included in base year expenses as it was a one-time expenditure - amortized over 27.5 years tax basis.

Improvements made to interior in 2024, including new granite countertops (from laminate), new kitchen sink & faucet (high-end), over-the-stove ventilation to exterior. Total Cost - \$11,497

Significant repairs and improvements now occurring in 2025 including new bathroom floor, new bedroom carpet, all new appliances, some requiring new plumbing & natural gas piping, new paint, etc. See Worksheet for 2025 improvements showing total expected cost of approximately \$13,600. Expected completion by July 1, 2025, ready for a new tenant, when marketed at new rental price being requested in this proposal/submission.

Last Monthly Rent Charged \$1,800/mo (May 2025)

Quoted Market Value Rent \$2,350/mo (mirror image unit across the hall)

Below Market by \$550/mo

Failure to keep up to market was due to my failure to increase monthly rent for 8.5 years, from 2013 to 2021 as noted in previous question, as well as not increasing rent as much as fully allowed since 2022.

See proposed bases in increase:

- | | |
|--|-----------|
| 1) Fair Return Calculation - Section XV | +\$302/mo |
| 2) Significant 2024 improvements worksheet | +\$103/mo |
| 3) Significant 2025 repairs/improvements worksheet | +\$251/mo |

Per regulations, the maximum allowable increase is 10%, or \$180, including New Tenant Allowance of 5%. Allowed Increase Percentage (AIP) for 2025 (percentage to be determined) and use of cumulative Banked Rent.

Requesting higher increases as provided by this document and related worksheets.

I am also requesting an adjustment to the Base Year (2019) Rent to be used in the Net Income calculation due to the fact that NO rent increases were made for the period from mid-2013 to the Base Year 2019 and even through to November 2021.

V. Income and Expense Explanation and Calculation

Calculation of Net Operating Income

Net operating income shall be calculated by subtracting operating expenses from gross rental income.

Gross Rental Income

Gross rental income includes:

- **Scheduled rental income at one hundred percent (100%) occupancy plus all other income or consideration received or in connection with the use or occupancy of the Rental Unit.**
If there is a change in the number of rental units between the Base Year & Current Year, the rental income and expenses for the same number of units shall be used in calculating the net operating income for both periods. The purpose of this provision is to provide a fair compensation between the Base Year and the Current Year.
- **Vacant or owner-occupied rental units at the time a petition is filed, that provided rental income in the Base Year, shall count toward the calculation of gross rental income in the Current Year. The Rent Program shall attribute rental income calculated on the basis of average rents for comparable units at the property that were most recently rented. If no comparable units on the property were rented within the last two years, initial rents for comparable units in the City may be used if there is no other basis for its calculation.**

Gross rental income shall not include:

- **Utility charges that are sub-metered, for gas, electricity or water paid directly by the tenant;**
- **Charges for refuse disposal, sewer service or other services (which are either provided solely on a cost pass-through basis if they are regulated by state or local law)**

VI. Operating Expenses

Operating expenses include reasonable costs of operation and maintenance of the Rental Unit, including:

- **Management Expenses;**
- **Utility Costs except a utility that are paid directly by the tenant(s);**
- **Real Property Taxes Assessed and Paid;**
- **Insurance;**
- **License, Registration and other Public Fees;**
- **Landlord-performed Labor;**
- **Legal Expenses;**
- **The Amortized Costs of Capital Improvements; and**
- **Other Reasonable Operating Expenses.**

Operating expenses shall not include the following:

- **Mortgage principal or interest payments or other debt service costs and costs associated with obtaining financing;**
- **Any penalties, fees or interest assessed or awarded for violation of any provision of this chapter or of any other provision of law;**
- **Land lease expenses;**
- **Political contributions and payments to organizations or individuals which are substantially devoted to legislative lobbying purposes;**
- **Depreciation;**
- **Any expenses for which the Landlord has been reimbursed by any utility rebate or discount, Security Deposit, insurance settlement, judgment for damages, settlement or any other method or device;**
- **Unreasonable increases in expenses since the Base Year;**
- **Expenses associated with the provision of master-metered gas and electricity services;**

- Expenses which are attributable to unreasonable delays in performing necessary maintenance or repair work or the failure to complete necessary replacements. (For example if a roof replacement is unreasonably delayed, the full cost of the roof replacement would be allowed; however, if interior water damage occurred as a result of the unreasonable delay, that expense would not be allowable to support a fair return); and
- Unreasonable Expenses.

Claim for Base Rent Adjustment

A claim may be made for a Base Year Rent Adjustment if the Base Year Rent and/or earlier rent amounts were disproportionately low. A Base Year Rent Adjustment will be considered if the evidence supporting a requested adjustment is provided and sufficiently compelling enough to show that special or peculiar circumstances prevented the landlord from receiving a fair return on investment during that period. Landlords may rebut the presumption that the Base Year net operating income provided a fair return. If a claim is made on this basis, the petitioner must complete Section XIX, Claim for Adjustment of Base Year Net Operating Income and Associated Rent Adjusted Claim at the end of this Application.

Check here ☒ if a claim for a Base Year Rent Adjustment is included in this application and complete Section XVIII of this Application.

VII. Income Worksheet

	Base Year (2019) ¹	Current Year (2024)
Rental Income		
1. Gross scheduled rental income (total for the calendar year) including uncollected rent.	\$ 19200	\$ 20400 106.25%
2. Portion Attributable to Vacancy	\$ 0	\$
Fees (indicate what fee is for):		
3. Late fees	\$	\$
4. List fees, other than utilities, collected for services & amenities not included in rent	\$	\$
5. _____	\$	\$
6. _____	\$	\$
7. _____	\$	\$
Other Income (list separately by type)²:		
8. _____	\$	\$
9. _____	\$	\$
10. _____	\$	\$
Fees charged by landlord for Utilities		
11. Gas	\$ 0	\$
12. Electricity	\$ 0	\$
13. Water	\$ 0	\$ 0
14. Sewer	\$ 0	\$ 0
15. Garbage & Recycling	\$ 0	\$ 0
Other Utilities (list separately by type):		
16. N/A	\$	\$
17. _____	\$	\$
18. TOTAL INCOME	\$ 19200	\$ 20400 106.25%
(add only lines 1 and 3-17)		

¹ or an alternative year in the event of extenuating circumstances.

² Interest earned by Landlord on Tenant security deposits, other interest, or investment income.

VIII. Operating Expense Worksheet

Additional operating expense items can be listed for this worksheet using separate page(s) as needed.

	Base Year (2019)	Current Year (2024)
1. Assessments	\$ _____	\$ 0
2. Real Property Taxes	\$ 3663 (paid in Cal Yr)	\$ 5203 (paid in Cal Yr)
3. License Tax/Fee	\$ _____	\$ _____
4. Rent Board Registration Fees	\$ 23	\$ 38
5. Insurance	\$ 215	\$ 223
6. Accounting	\$ _____	\$ _____
7. Legal (explain types of legal expenses)	\$ _____	\$ _____
8. Manager /Management Services	\$ 3716	\$ 4872
9. Security	\$ _____	\$ _____
10. Office Supplies	\$ 353	\$ _____
12. Normal Repairs	\$ 160	\$ 194
13. Owner-Performed Labor	\$ _____	\$ _____
14. Plumbing Maintenance	\$ _____	\$ _____
15. Pool Maintenance	\$ _____	\$ _____
16. Landscape Maintenance/snow removal	\$ _____	\$ _____
17. Other Maintenance	\$ _____	\$ 252
18. Parking Lot/Street Maintenance	\$ _____	\$ _____
19. Gas (separately metered only)	\$ _____	\$ _____
20. Electricity (separately metered only)	\$ _____	\$ _____
21. Water	\$ _____	\$ _____
22. Sewer	\$ _____	\$ _____
23. Amortized portion of Capital Expense (see Sections X, XI and XII column (i))	\$ _____	\$ _____
24. Vandalism Repairs	\$ _____	\$ _____
25. Uninsured Damages	\$ _____	\$ _____
27. TOTAL OPERATING EXPENSES	\$ 8130	\$ 10782

IX. Allowances for Capital Improvements

Operating expenses include the amortized costs of capital improvements plus an interest allowance to cover the amortization of those costs. A capital improvement shall be any improvement to a unit or property which materially adds to the value of the property, appreciably prolongs its useful life or adapts it to a new use and has a useful life of more than one year and a direct cost of \$250.00 or more per unit.

Allowances for capital improvements shall be subject to the following conditions:

1. The amortization period shall be in conformance with the schedule adopted by the City, as provided in Section XI, unless it is determined that an alternate period is justified based on the evidence presented at the Rent Board hearing.
2. Capital improvement costs do not include costs incurred to bring the Rental Unit into compliance with a provision of Portland Code or state law where the original installation of the improvement was not in compliance with code requirements.

Example of a Capital Improvement with Amortized Expenses and an Interest Allowance:

Owner filed a Petition on March 1, 2023 for an individual rent adjustment for a roof that was completed covering a four-rental unit building. The cost of the Capital Improvement was \$20,000 benefiting all four units in the building. The amortization period for a roof is ten (10) years according to the below tables. The applicable interest allowance based on the Primary Mortgage Survey is 3.88% + 2% for this example. The calculation of the capital improvement per month is:

Capital Improvement Cost	Interest Allowance	Period	Total Principal & Interest – Life of Improvement	Total Interest – Life of Improvement
\$20,000	5.88%	10 years (120 months)	\$26,500.52	\$6,500.52

Annual Amortized Cost	Monthly Amortized Cost	# of Units	Monthly Cost per Unit
\$2,650.05	\$220.84	4	\$55.21

X. Amortization Period of Capital Improvements/Expenses

In amortizing capital improvements/ expenses, the following schedule shall be used to determine the amortization period of the capital improvements and expenses. Improvements add to the health & safety of the rental unit.

	Years
Appliances	
Air Conditioners*	10
Refrigerator*	5
Stove*	5
Garbage Disposal	5
Water Heater*	5
Dishwasher	5
Microwave Oven	5
Washer/Dryer	5
Basic Items	
Fans*	5
Cabinets*	10
Carpentry	10
Counters*	10
Doors*	10
Knobs	5

	Years
Screen Doors	5
Fencing and Security*	5
Management	5
Tenant Assistance	5
Structural Repair and Retrofitting	
Foundation Repair*	10
Foundation Replacement*	20
Foundation Bolting*	20
Iron or Steel Work	20
Masonry-Chimney Repair*	20
Shear Wall Installation*	10
Electrical Wiring*	10
Elevator*	20
Fencing	
Chain	10
Block	10
Wood	10

	Years
Fire Systems	
Fire Alarm System*	10
Fire Sprinkler System*	20
Fire Escape*	10
Flooring/Floor Covering	
Hardwood	10
Tile and Linoleum	5
Carpet	5
Carpet Pad	5
Subfloor	10
Fumigation Tenting*	5
Furniture	5
Automatic Garage Door Openers*	10
Gates	
Chain Link	10
Wrought Iron	10
Wood	10

	Years
Glass	
Windows*	5
Doors*	5
Mirrors	5
Heating*	
Central	10
Gas	10
Electric	10
Solar	10
Insulation	10
Landscaping	
Planting	10
Sprinklers	10
Tree Replacement	10
Lighting	

	Years
Interior*	10
Exterior*	5
Exterior	
Locks*	10
Mailboxes*	10
Meters*	10
Plumbing	
Fixtures*	10
Pipe Replacement*	10
Re-Pipe Entire Building*	20
Shower Doors*	5
Painting	
Interior	5
Exterior	5
Paving	
Asphalt	10
Cement	10

	Years
Decking	10
Plastering	10
Sump Pumps*	10
Railings*	10
Roofing*	
Shingle/Asphalt	10
Built-up, Tar and Gravel	10
Tile	10
Gutters/Downspouts	10
Security*	
Entry Telephone Intercom	10
Gates/Doors	10
Fencing	10
Alarms	10
Sidewalks/Walkways*	10
Stairs	10
Stucco	10

	Years
Tilework	10
Wallpaper	5
Window Coverings*	
Drapes	5
Shades	5
Screens	5
Awnings	5
Blinds/Mini-blinds	5
Shutters	5

*Capital Improvements generally concern any change or addition to a unit or property which materially adds to the value of the property, appreciably prolongs its useful life or adapts it to a new use and has a useful life of more than one year and a direct cost of \$250 or more per unit.

The * items are likely capital improvements. Other items may depend on the circumstances.

XI. Interest Allowance on Capital Improvements

If an amount was reported as an amortized portion of expenses on Section IX, Operating Expense Worksheet, line 23 of the Base Year or current operating expense table above, complete this section.

An interest allowance may be calculated on the cost of amortized expenses. The interest allowance shall be the interest rate equivalent to the "average rate" for a thirty-year fixed rate on home mortgages plus two percent (2%). The "average rate" shall be the rate Freddie Mac last published in its weekly Primary Mortgage Market Survey (PMMS) as of the date of the initial petition. <http://www.freddiemac.com/pmms/archive.html>

Please use the Microsoft Excel version of this page (available from the Housing Safety Office) or an online amortization calculator to ensure that your numbers are correct.

Completed Capital Improvement and Expense Worksheet (Base Year)

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)
Item #	Brief Description	# of Units Impacted	Initial Cost	Interest Rate Allowed*	Amortization Period (years)*	Interest Amount	Total Cost [Principal + Interest]	Annual Cost	Monthly Cost	Monthly Cost Per Unit
1	Condo Assessment	1	\$ 5570	8.85%	10	\$ 424.69	\$ 5994.69	\$ 599.47	\$ 49.96	\$ 49.96
			\$	%		\$	\$	\$	\$	\$
			\$	%		\$	\$	\$	\$	\$
			\$	%		\$	\$	\$	\$	\$
			\$	%		\$	\$	\$	\$	\$
			\$	%		\$	\$	\$	\$	\$
			\$	%		\$	\$	\$	\$	\$

*Use the amortization table in this Attachment and the information about interest rates.

Total for Base Year [add amounts in column (d)]: \$ 5570

Annual Cost for Base Year [add amounts in column (i)]: \$ 599.47

Completed Capital Improvement and Expense Worksheet (Current Year)

This list may include any capital expenses that are still being amortized in the current year. For example, if a roof was replaced last year, the amortized portion may be counted in the current year.

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)
Item #	Brief Description	# of Units Impacted	Initial Cost	Interest Rate Allowed*	Amortization Period (years)*	Interest Amount	Total Cost [Principal + Interest]	Annual Cost	Monthly Cost	Monthly Cost Per Unit
1	Kitchen Faucet/Pl	1	1359	8.85%	10	103.62	1462.63	146.26	12.19	12.19
2	Granite Countertc	1	5696	8.85%	10	434.30	6130.30	613.03	51.09	51.09
3	Stove Vent to Out	1	3560	8.85%	10	271.44	3831.44	383.14	31.93	31.93
4	Kitchen Backsplas	1	882	8.85%	10	67.25	949.25	94.92	7.97	7.91
			\$	%		\$	\$	\$	\$	\$
	Total	1	11497	8.85%		876.60	12373.60	1237.36	103.11	103.11
			\$	%		\$	\$	\$	\$	\$

*Use the amortization table in this Attachment and the information about interest rates.

Total for Current Year [add amounts in column (d)]: \$ 11,497.00

Annual Cost for Current Year [add amounts in column (i)]: \$ 1,237.36

XII. Blank Worksheet (Optional – Available for Petitioner Use)

XIII. Owner-Performed Labor

Landlord-performed labor shall be compensated at reasonable hourly rates. However, no Landlord-performed labor shall be included as an operating expense unless the Landlord submits documentation showing the date, duration, and nature of the work performed. There shall be a maximum allowed under this provision of five percent (5%) of gross income unless the Landlord demonstrates that greater services were performed for the benefit of the residents.

Owner Performed Labor – Base Year

Date (or Range)	Hours	Hourly Rate	Units Impacted	Type of Work
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Owner Performed Labor – Current Year

Date	Hours	Hourly Rate	Units Impacted	Type of Work
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

XIV. Planned Capital Improvements

To encourage necessary capital improvements and expenses, a Landlord may include anticipated future expenses for the amortized cost of capital improvements and expenses in a fair return petition. An allowance shall be made for anticipated expenses that the Landlord intends to incur during the twenty-four month period following the date of a final Rent Program determination. This procedure should not be used for anticipated expenses for ordinary maintenance and repairs. The portion of any allowable rent increase attributable to the capital improvement and expense shall not go into effect until completion has been documented to the Rent Program.

Complete this table only if you are seeking preliminary approval for improvements you plan to complete within the next twenty-four (24) months. A rent increase cannot be granted until the improvements are completed and documentation of the cost of the improvements has been reviewed and approved by the City.

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)
Item #	Brief Description and Expected Date of Completion	# of Units Impacted	Initial Cost	Interest Rate Allowed*	Amortization Period (years)*	Interest Amount	Total Cost [Principal + Interest]	Annual Cost	Monthly Cost	Monthly Cost Per Unit
1	Worksheet-Jun25	1	13733	8.85%	Var	593.14	14325.99	2645.59	220.47	220.47
2			\$	%		\$	\$	\$	\$	\$
3			\$	%		\$	\$	\$	\$	\$
4			\$	%		\$	\$	\$	\$	\$
5			\$	%		\$	\$	\$	\$	\$

*Use the amortization table in this Attachment and the information about interest rates.

Proposed Capital Expenses [add amounts in column (d)]: \$ Approx. \$13,733

Annual Cost for Proposed Capital Expenses [add amounts in column (i)]: \$ Approx. \$2,646

XV. Net Operating Income (NOI)

Net Operating Income = Income – Operating Expenses

	Base Year (2019)	Current Year (2024)
1. Total Annual Income	\$ 19200	\$ 20400
2. Annual Operating Expenses	\$ 8130	\$ 10782
3. Net Annual Operating Income	\$ 11070	\$ 9618
4. CPI [Annual Average CPI]	281.082	336.376
5. Percent Annual Increase in CPI Base Year to Current Year		19.67 %
	$\frac{\text{Line 4 Current Year} - \text{Line 4 Base Year}}{\text{Line 4 Base Year}} \times 100$	
6. Fair Net Annual Operating Income = Base Year Net Operating Income Adjusted by CPI Increase		\$ 13247
	$\frac{\text{Line 5} + 100}{100} \times \text{Line 3 Base Year}$	
7. Fair Net Annual Operating Income Minus Current Net Operating Income = Allowable Rent Increase		\$ 3629
	Line 6 – Line 3 Current Year	
8. Allowable Rent Increase/Unit/Month ³		\$ 302
	Line 7 ÷ 12 ÷ # of Units	

³ If applied equally per unit. The Landlord may propose to allocate using a different rational basis. To detail a different allocation, complete XVIII Proposed Adjustment Worksheet.

XVI. Monthly Rent Worksheet

List the monthly rent, including all fees, charged each tenant, for the twelve (12) months preceding the date of the petition. If the rent was raised during the twelve-month period preceding the petition, including the amount of any fees, list each rent charged and indicate the date each raise was implemented. Provide the year and amount of any unused (banked) Annual Increase Percentage (AIP), Tax Rate Rent Adjustment (prior to 2023), or New Tenancy, or any other rent increase authorized by the Rent Board that have been banked with proper notice to each tenant for future rent increases.

Unit #	Rent	AIP & New Tenant Increase	Date of Increase	AIP & New Tenant Taken (%)	AIP & New Tenant Deferred (%)	Other Charges (Please specify)	Comment
1	\$ 1650	\$45.17 PTa	12/01/2021	%	%	\$ 0	Rent increase of \$50 from \$1,600
1	\$ 1700	\$113.98 PTi & AIP	06/01/2023	43.9 %	56.1 %	\$ 0	Rent increase of \$50 from \$1,650
1	\$ 1700	\$115.5 AIP	01/01/2024	0 %	100 %	\$ 0	No Rent increase in 2024
1	\$ 1800	\$34 AIP	01/01/2025	100 %	0 %	\$	Rent increase of \$100 from \$1,700 or
	\$	\$		%	%	\$	
	\$	\$		%	%	\$ 114	Remaining Banked Rent
	\$	\$		%	%	\$	
	\$	\$		%	%	\$	

_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____
_____	\$ _____	\$ _____	_____	_____ %	_____ %	\$ _____	_____

XVII. Proposed Adjustment Worksheet

Use the worksheet below to document current and proposed rents on a per-unit basis. MNOI increases should be distributed on a per capita basis or proportionally to the square footage or costs and expenses attributed to each unit.

Indicate method of allocation: Single Unit - No allocation needed

Unit #	Base Period Rent Year (2019)	Date Tenancy Commenced (mm/dd/yyyy)	Initial Rent of Current Tenant/s	Date of Last Rent Increase (mm/dd/yyyy)	Rent used in Current Year Income Calculation	Rent as of Date Petition Submitted	Proposed Rent
1	\$ 1600	04/27/2019	\$ 1600	01/01/2025	\$ 1800	\$ 1800	\$ 2300
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____

_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	_____	\$ _____	\$ _____	\$ _____

XVIII. CLAIM FOR ADJUSTMENT OF BASE YEAR NET OPERATING INCOME AND ASSOCIATED RENT ADJUSTED CLAIM

The ordinance dictates that the Rent Board must presume the net operating income the landlord earned from a covered unit during calendar year 2019 yielded a fair return on investment, unless the landlord proves that special or peculiar circumstances prevented the landlord from receiving a fair return on investment during that period. **Complete this Section XIX and the following Sections XX and XXI only if you are seeking an adjustment in base rent due to special or peculiar circumstances.**

Check the factors below that are applicable to your claim.

- A. **Exceptional Expenses in the Base Year.** The landlord's operating expenses in the base year were unusually high or low in comparison to other years. In such instances, adjustments may be made in calculating operating expenses in order that the base year operating expenses reflect average expenses for the property over a reasonable period of time. Check which factor(s) contributed to your claim:
 - a. Extraordinary amounts were expended for necessary maintenance and repairs
 - b. Maintenance and repair expenditures were exceptionally low as to cause inadequate maintenance or significant deterioration in the quality of services provide
 - c. Other expenses were unreasonably high or low notwithstanding the application of prudent business practices.
- B. **Exceptional Circumstances in the Base Year.** The gross income during the base year was disproportionately low due to exceptional circumstances. In such instances, adjustments may be made in calculating base year gross rental income consistent with the purpose of analyzing base year net operating income. Check which factor(s) contributed to your claim:
 - a. The gross income during the base year was lower than it might have been because some residents were charged reduced rent.
 - b. The gross income during the base year was significantly lower than normal because of the destruction of the premises and/or temporary relocation for construction or repairs.
 - c. The pattern of rent increases in the years prior to the base year were less than increases in the CPI.
- C. **Other exceptional circumstances: (specify)**

Property is a 1 Bedroom Condo Unit on Munjoy Hill. Purchased in May/June 2013
First and subsequent tenants starting in 2013 were charged \$1,600/mo from 2013 to 12/01/2021, i.e. same rent charged for nearly nine (9) years!! Even during those years, the rent charged was below market for that area for all years to current year.

If the Rent Board determines that one or more of the above circumstances apply, the calculation of MNOI in Section XX will be performed with an Adjusted Gross Income, and that will be substituted for the Section XVI calculations. This figure represents the income that would have been expected absent the exceptional circumstances. Options for determining Adjusted Gross Income include, but are not limited to:

- A. Base year rents charged for any comparable units in the same building.
- B. The FY 2019 Fair Market Rents for Portland, ME, reported by the US Department of Housing:⁴

Efficiency	One-Bedroom	Two-Bedroom	Three-Bedroom	Four-Bedroom
\$989	\$1,071	\$1,387	\$1,829	\$2,198

⁴ These values do not include the cost of utilities. If using these numbers, do not include the cost of utilities in the base year when completing the expense portion of the worksheet.

- C. An appraisal of comparable fair market rental values as of 2019 for units similar to the units that are the subject of this application which has been prepared by a Maine licensed appraiser and is attached to this application.

Actual Gross Income for 2019: \$ 19200

Proposed Adjusted Gross Income for 2019: \$ 24000

Briefly describe the method for obtaining the proposed income and attach any relevant documentation in support of the claim for an adjustment of base year rent.

XIX. Income and Operating Expense Worksheet With Adjustment of Base Year

	Base Year (2019)	Current Year (2024)
Rental Income		
1. Adjusted Gross Income (with Adjusted Base Year as proposed in Section XIX)	\$ 24000	\$ 27600
2. Portion Attributable to Vacancy	\$	\$
Fees (indicate what fee is for):		
3. Late fees	\$	\$
4. List fees, other than utilities, collected for services & amenities not included in rent	\$	\$
5. _____	\$	\$
6. _____	\$	\$
7. _____	\$	\$
Other Income (list separately by type)⁵:		
8. _____	\$	\$
9. _____	\$	\$
10. _____	\$	\$
Fees charged by landlord for Utilities		
11. Gas	\$	\$
12. Electricity	\$	\$
13. Water	\$	\$
14. Sewer	\$	\$
15. Garbage & Recycling	\$	\$
Other Utilities (list separately by type):		
16. _____	\$	\$
17. _____	\$	\$
18. TOTAL INCOME	\$ 24000	\$ 27600
(add only lines 1 and 3-17)		

⁵ Interest earned by Landlord on Tenant security deposits, other interest or investment income.

XX. Calculation of Fair Return Rent Adjustment with Adjustments of Base Year Amount

Complete only if seeking an adjustment of base year rent.

	Base Year (2019)	Current Year (2024)
1. Total Annual Income	\$ 24000	\$ 27600
2. Annual Operating Expenses	\$ 8130	\$ 10744
3. Net Annual Operating Income	\$ 15870	\$ 16856
4. CPI [Annual Average CPI]	281.082	336.376
5. Percent Annual Increase in CPI Base Year to Current Year		19.67 %
	$\frac{\text{Line 4 Current Year} - \text{Line 4 Base Year}}{\text{Line 4 Base Year}} \times 100$	
6. Fair Net Annual Operating Income = Base Year Net Operating Income Adjusted by CPI Increase		\$ 18992
	$\frac{\text{Line 5} + 100}{100} \times \text{Line 3 Base Year}$	
7. Fair Net Annual Operating Income Minus Current Net Operating Income = Allowable Rent Increase		\$ 2136
	Line 6 – Line 3 Current Year	
8. Allowable Rent Increase/Unit/Month ⁶		\$ 178
	Line 7 ÷ 12 ÷ # of Units	

⁶ If applied equally per unit. The Landlord may propose to allocate using a different rational basis. To detail a different allocation, complete XVIII Proposed Adjustment Worksheet.

XXI. Other Claims

Explain any other claims in support of this application and provide/attach any evidence in support of those claims. Please use additional pages as appropriate:

Requesting an Adjustment of Base Rent (2019) from the actual value of \$1,600/mo to the more realistic value of \$2,000/mo., consistent with similar properties located in Portland/Munjoy Hill area.

Reasoning: See explanation for "Exceptional Circumstances in Base Year" on page 23 Section B.a. and B.c., as quoted:

B.a. "The gross income during the base year was lower than it might have been because some residents were charged reduced rent."

B.c. "The pattern of rent increases in the years prior to the base year were less than increases in the CPI."

Primary reason for proposed adjustment to Base Year Rent is due to the fact that NO INCREASES IN RENT were made for the period of June 2013 to November 2021, a total of 8 1/2 years. In those years, normal inflation occurred, and property taxes increased annually, nearly doubling in that same period. Additionally, the Condo Fees passed to owners from the Condo Association increased from \$197/mo. to \$309/mo., an increase of 58% over the 8+ years.

Overall, during that period of 2013 to 2021, expenses increased in all line items, but there was no increase in revenue at all. Personally, I thought I was doing multiple tenants a favor by keeping rent low, while I was not paying much attention to the increase in expenses. I also failed to keep up on researching and keeping myself informed of the change in the Market Value for similar units in the Portland/Munjoy Hill area.

I am requesting the adjustment to Base Year income for the fact that I didn't increase rent for an 8+ year period, did not take into account normal inflation, all while also make small improvements (painting, replacing carpeting and replacing certain appliances).

While this unit is not a low-income unit, the original investment in the property should justify normal increases in rent that were not being passed along to the tenants.

XXII. Documentation of Current Year Income & Operating Expenses

1. Organize documents by operating expense category.
2. Number each page, submitted with this Application, with the number of the Expense Category (for instance on page 7, category of Landscape Maintenance is on line 16, any documents supporting that line item would be marked p.7, 16-1, p. 7 16-2, p. 7 16-3 and so on).

XXIII. Current Tenant Information

If there are more than four affected tenants, attach additional sheet(s).

Tenant's Name Currently between tenants as of 6/12/2025 102
First Last Unit number
Mailing address if different _____ Email address: _____

Tenant's Name Currently between tenants _____
First Last Unit number
Mailing address if different _____ Email address: _____

Tenant's Name _____
First Last Unit number
Mailing address if different _____ Email address: _____

Tenant's Name _____
First Last Unit number
Mailing address if different _____ Email address: _____

XXIV. Certification

I hereby certify that the information provided is accurate to the best of my knowledge, request that any required notices be given and ask that a hearing be scheduled in front of the Rent Board to process this request for a rent increase as outlined above.

Signature of Applicant Landlord:

Matthew F. Davies  6/20/25
06/12/2025

Printed name

Signature

Date

**CITY OF PORTLAND**389 CONGRESS ST
PORTLAND, ME 04101

For the fiscal year July 01, 2023 to June 30, 2024

BILL #: 2400822
ACCOUNT #: 28074
PARCEL ID #: 013-K-002-102
LOCATION: 135 SHERIDAN ST 102DAVIES MATTHEW F
56 MARLU ST
WESTBROOK, ME 04092Owner of Record as of: April 1, 2023
DAVIES MATTHEW F**CURRENT BILL RATE DISTRIBUTION**

SCHOOL	7.450	\$2,635.06
COUNTY	0.620	\$219.29
MUNICIPAL	6.340	\$2,242.46
TOTAL	14.410	\$5,096.82

**THIS IS THE ONLY BILL
YOU WILL RECEIVE**

Assessed Property Description:

13-K-2
SHERIDAN ST 131-135
135 SHERIDAN CONDO
UNIT 102
Acres: 0.000**FY24 REAL ESTATE TAX BILL****BILLING INFORMATION**

LAND VALUE	\$70,740
BUILDING VALUE	\$282,960
TOTAL VALUE	\$353,700
EXEMPTIONS	\$0
TAXABLE VALUE	\$353,700
TAX RATE	14.410
TOTAL TAX	\$5,096.82
PAYMENTS/CREDITS	\$0.00
ABATEMENT/ADJUST	\$0.00
TAX DUE	\$5,096.82

DATE DUE	AMOUNT DUE
10/19/2023	\$2,548.41
03/14/2024	\$2,548.41

19/18/24 next page → 2659.52
5202.93**INTEREST AT 8% PER ANNUM CHARGED BEGINNING 10/20/2023 AND 03/15/2024.****TAXPAYER'S NOTICE**Per State law, the ownership and valuation of all real estate and personal property subject to taxation shall be fixed as of April 1st.
For this tax bill, that date is April 1, 2023.**IF THIS PROPERTY HAS BEEN TRANSFERRED, PLEASE FORWARD A COPY OF THIS BILL TO THE NEW OWNER.
THIS IS ONLY FOR THE CURRENT FISCAL YEAR****INFORMATION****Without State Aid for Education, Homestead and BETE Exemption Reimbursement and State Revenue Sharing, your taxes would be 15.7% higher. The current City and School bonded indebtedness is \$370,989,894.**
For information regarding changes or valuations, please contact the Assessor's Office at (207) 874-8486. Information regarding payments, interest, lien cost charges, and/or refunds, please contact the Treasury Office at (207) 874-8490.**REMITTANCE INSTRUCTIONS****THIS IS THE ONLY BILL YOU WILL RECEIVE. THIS BILL INCLUDES TWO (2) PAYMENT VOUCHERS.**Please make check or money order payable to City of Portland and mail to:City of Portland Treasury
PO Box 16050
Lewiston, ME 04243-9533For payments in person, please go to the Treasury Office located in Room 102 of City Hall.
If your bank or mortgage company pays your taxes, please review and forward a copy of this bill to them.**FY24 REAL ESTATE TAX BILL**THIS STUB MUST BE RETURNED WITH YOUR **SECOND** PAYMENT**CITY OF PORTLAND TREASURY**
PO Box 16050
LEWISTON, ME 04243BILL #: 2400822
ACCOUNT #: 28074
PARCEL ID #: 013-K-002-102INTEREST AT 8% CHARGED
BEGINNING 03/15/2024

DATE DUE	AMOUNT DUE
03/14/2024	\$2,548.41

DAVIES MATTHEW F

AMOUNT PAID \$ _____

208202480240082292600002548410

p7, 2-1

**CITY OF PORTLAND**389 CONGRESS ST
PORTLAND, ME 04101

For the fiscal year July 01, 2024 to June 30, 2025

BILL #: 2506388
ACCOUNT #: 28074
PARCEL ID #: 013-K-002-102
LOCATION: 135 SHERIDAN ST 102DAVIES MATTHEW F
56 MARLU ST
WESTBROOK, ME 04092Owner of Record as of: April 1, 2024
DAVIES MATTHEW F

CURRENT BILL RATE DISTRIBUTION		
SCHOOL	7.880	\$2,787.16
COUNTY	0.560	\$198.07
MUNICIPAL	6.570	\$2,323.81
TOTAL	15.010	\$5,309.04

**THIS IS THE ONLY BILL
YOU WILL RECEIVE**Assessed Property Description:
13-K-2
SHERIDAN ST 131-135
135 SHERIDAN CONDO
UNIT 102
Acres: 0.000**FY25 REAL ESTATE TAX BILL**

BILLING INFORMATION	
LAND VALUE	\$70,740
BUILDING VALUE	\$282,960
TOTAL VALUE	\$353,700
EXEMPTIONS	\$0
TAXABLE VALUE	\$353,700
TAX RATE	15.010
TOTAL TAX	\$5,309.04
PAYMENTS/CREDITS	\$0.00
ABATEMENT/ADJUST	\$0.00
TAX DUE	\$5,309.04

DATE DUE	AMOUNT DUE
10/18/2024	\$2,654.52
03/14/2025	\$2,654.52

INTEREST AT 8% PER ANNUM CHARGED BEGINNING 10/19/2024 AND 03/15/2025.**TAXPAYER'S NOTICE**Per State law, the ownership and valuation of all real estate and personal property subject to taxation shall be fixed as of April 1st.
For this tax bill, that date is April 1, 2024.**IF THIS PROPERTY HAS BEEN TRANSFERRED, PLEASE FORWARD A COPY OF THIS BILL TO THE NEW OWNER.
THIS IS ONLY FOR THE CURRENT FISCAL YEAR****INFORMATION****Without State Aid for Education, Homestead and BETE Exemption Reimbursement and State Revenue Sharing, your taxes would be 15.7% higher. The current City and School bonded indebtedness is \$374,509,262.**
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PO Box 16050
Lewiston, ME 04243-9533**For payments in person, please go to the Treasury Office located in Room 102 of City Hall.
If your bank or mortgage company pays your taxes, please review and forward a copy of this bill to them.**FY25 REAL ESTATE TAX BILL**THIS STUB MUST BE RETURNED WITH YOUR **SECOND** PAYMENT**CITY OF PORTLAND TREASURY
PO Box 16050
LEWISTON, ME 04243**BILL #: 2506388
ACCOUNT #: 28074
PARCEL ID #: 013-K-002-102INTEREST AT 8% CHARGED
BEGINNING 03/15/2025

DATE DUE	AMOUNT DUE
03/14/2025	\$2,654.52

DAVIES MATTHEW F

AMOUNT PAID \$ _____

208202550250638842600002654523

p 7, 2-2

**INVOICE (INV-00111157)
FOR CITY OF PORTLAND**

BILLING CONTACT
Matthew Davies

135 Sheridan Street 102
Portland, Me 04101



INVOICE NUMBER	INVOICE DATE	INVOICE DUE DATE	INVOICE STATUS	INVOICE DESCRIPTION
INV-00111157	12/20/2024	01/19/2025	Due	NONE

CASE NUMBER	FEE NAME	TOTAL
20183199	Long Term Rental Registration Fee	\$37.50
135 Sheridan St Portland, ME		SUB TOTAL \$37.50

REMITTANCE INFORMATION
City of Portland 389 Congress St Portland, ME 04101

TOTAL **\$37.50**

p7, 4



CONCORD GROUP
INSURANCE

Concord General Mutual Insurance Company
35B Constitution Dr., Ste. 101 | Bedford, NH 03110
p. 800-852-3380
ConcordGroupInsurance.com

ANNIVERSARY RENEWAL DECLARATIONS

THIS IS NOT A BILL. Your bill will be sent separately.

Refer billing, policy or coverage questions to:

Named Insured and Address:

UNITED INSURANCE PORTLAND
470 FOREST AVE
PORTLAND, ME 04101
(207) 797-9400

1169609 18-730

Matthew Davies
56 Marlu St
Westbrook, ME 04092-4627

This Anniversary Renewal Declarations reflects your renewal coverages and premiums for the upcoming year. If new or revised forms or endorsements apply, they are attached. Please contact your agent with any questions.

A Valued Customer Since 2013

POLICY NUMBER	POLICY TYPE	POLICY PERIOD	EFFECTIVE DATE	PAYMENT PLAN	BILL TO
1169609	Advantage Plus Condos HO 00 06	04/30/2024 TO 04/30/2025 12:01 AM Standard Time	04/30/2024	1-Pay	Insured

LOCATION OF PREMISES

135 Sheridan St Unit 102, Portland, ME

SECTION I COVERAGES

	Limit	Premium
A. Dwelling	\$30,000	\$26.00
C. Personal Property	\$30,000	\$114.00
D. Loss of Use	\$15,000	Included
Section I losses are subject to a \$1000 deductible		Included

SECTION II COVERAGES

	Limit	Premium
E. Personal Liability	\$500,000	\$7.00
F. Medical Payments To Others	\$5,000	\$8.00

ADDITIONAL COVERAGES and ENDORSEMENTS See following page(s) for details.

	Premium
Additional Coverages	\$68.00

CREDITS and DISCOUNTS APPLIED TO YOUR POLICY PREMIUM

Protective Devices Loss Free	Paid-In-Full
CREDITS and DISCOUNTS	
	Included

TOTAL ANNUAL PREMIUM

\$223.00



P7.5

paid
5/2/24
ACH to
135 Sheridan
Acct

135 SHERIDAN 2024 DUES ASSESSMENT

2022 Fee	2023 Fee	2024 Fee	UNIT #	SQ	% INT.	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	TOTAL
327	389	408	101	825	3.3339%	408	408	408	408	408	408	408	408	408	408	408	408	4,898
325	386	406	102	820	3.3137%	406	406	406	406	406	406	406	406	406	406	406	406	4,868
459	547	574	201	1160	4.6876%	574	574	574	574	574	574	574	574	574	574	574	574	6,887
466	555	583	202	1178	4.7604%	583	583	583	583	583	583	583	583	583	583	583	583	6,994
461	549	576	203	1165	4.7078%	576	576	576	576	576	576	576	576	576	576	576	576	6,917
498	592	622	204	1257	5.0796%	622	622	622	622	622	622	622	622	622	622	622	622	7,463
430	512	538	205	1087	4.3926%	538	538	538	538	538	538	538	538	538	538	538	538	6,453
430	512	538	206	1087	4.3926%	538	538	538	538	538	538	538	538	538	538	538	538	6,453
459	547	574	301	1160	4.6876%	574	574	574	574	574	574	574	574	574	574	574	574	6,887
623	742	779	303	1574	6.3606%	779	779	779	779	779	779	779	779	779	779	779	779	9,345
498	592	622	304	1257	5.0796%	622	622	622	622	622	622	622	622	622	622	622	622	7,463
430	512	538	305	1087	4.3926%	538	538	538	538	538	538	538	538	538	538	538	538	6,453
430	512	538	306	1087	4.3926%	538	538	538	538	538	538	538	538	538	538	538	538	6,453
487	580	609	307	1231	4.9745%	609	609	609	609	609	609	609	609	609	609	609	609	7,308
1007	1198	1258	401	2543	10.2764%	1,258	1,258	1,258	1,258	1,258	1,258	1,258	1,258	1,258	1,258	1,258	1,258	15,098
620	738	775	402	1566	6.3283%	775	775	775	775	775	775	775	775	775	775	775	775	9,297
498	592	622	404	1257	5.0796%	622	622	622	622	622	622	622	622	622	622	622	622	7,463
430	512	538	405	1087	4.3926%	538	538	538	538	538	538	538	538	538	538	538	538	6,453
430	512	538	406	1087	4.3926%	538	538	538	538	538	538	538	538	538	538	538	538	6,453
487	580	609	407	1231	4.9745%	609	609	609	609	609	609	609	609	609	609	609	609	7,308
				24,746														
\$9,795	\$11,659	\$12,245			100.000%	\$12,243	\$12,243	\$12,243	\$12,243	\$12,243	\$12,243	\$12,243	\$12,243	\$12,243	\$12,243	\$12,243	\$12,243	\$146,916
Annual																		

Condo Fees 2024
 See Budget next page
 $\$406 \times 12 = 4872$

**135 SHERIDAN CONDOMINIUM ASSOCIATION
ANNUAL OPERATING BUDGET
2024**

2024
Budget

		J	F	M	A	M	J	J	A	S	O	N	D	
EXPENSES														
5000	Electricity	\$ 1,400	\$ 1,400	\$ 2,100	\$ 1,600	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,500	\$ 15,000
5040	Water /Sewer	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,000	\$ 1,000	\$ 1,000	\$ 12,800
5200	Cleaning Extra									\$ 500	\$ 600			\$ 1,100
5220	Common Area Cleaning	\$ 1,250	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,250	\$ 1,000	\$ 1,250	\$ 1,000	\$ 1,000	\$ 1,250	\$ 1,000	\$ 1,150	\$ 13,150
5230	Cleaning-Flooring					\$ 2,620								\$ 2,620
5290	Trash	\$ 265	\$ 265	\$ 265	\$ 265	\$ 265	\$ 265	\$ 265	\$ 265	\$ 265	\$ 265	\$ 265	\$ 265	\$ 3,180
5330	Landscape Misc					\$ 400	\$ 500			\$ 900				\$ 1,800
5465	Snow Removal/Misc			\$ 1,000										\$ 1,000
5470	Grounds Contract	\$ 1,000	\$ 1,144	\$ 1,144	\$ 710	\$ 710	\$ 710	\$ 710	\$ 710	\$ 710	\$ 710	\$ 710	\$ 855	\$ 9,823
5500	Fire Safety Expense					\$ 940					\$ 200			\$ 1,140
5505	City Fire Service						\$ 275							\$ 275
5540	Sprinkler Expense	\$ 207			\$ 207	\$ 50	\$ 207				\$ 207			\$ 878
5590	DMC monthly life safety check	\$ 85	\$ 185	\$ 85	\$ 85	\$ 185	\$ 85	\$ 85	\$ 85	\$ 185	\$ 85	\$ 85	\$ 85	\$ 1,320
5600	Elevator Phone/ Intercom	\$ 65	\$ 65	\$ 65	\$ 65	\$ 65	\$ 65	\$ 65	\$ 65	\$ 65	\$ 65	\$ 65	\$ 65	\$ 780
5601	Elevator Inspection						\$ 205	\$ 70	\$ 50					\$ 325
5710	Building Maintenance	\$ 300	\$ 400	\$ 600	\$ 800	\$ 800	\$ 786	\$ 900	\$ 900	\$ 900	\$ 600	\$ 400	\$ 200	\$ 7,586
5810	Garage Door Maintenance			\$ 350	\$ 300		\$ 350			\$ 350	\$ 300		\$ 350	\$ 2,000
5840	Storm drain maintenance	\$ 400	\$ 500				\$ 1,500							\$ 2,400
6010	HVAC maintenance/repair				\$ 790	\$ 500						\$ 790	\$ 500	\$ 2,580
6020	Elevator Service/repair		\$ 195			\$ 195	\$ 250		\$ 195			\$ 195		\$ 1,030
6025	Dryer Vent Cleaning					\$ 1,890								\$ 1,890
6300	Insurance	\$ 1,038	\$ 1,308	\$ 1,308	\$ 1,308	\$ 1,308	\$ 1,308	\$ 1,308	\$ 1,308	\$ 1,308	\$ 1,438	\$ 1,438	\$ 1,438	\$ 15,816
6700	Admin/Misc Expense		\$ 80				\$ 125					\$ 75	\$ 285	\$ 565
6800	Professional Fees		\$ 350	\$ 350	\$ 350	\$ 200								\$ 1,250
6900	Management Fee	\$ 735	\$ 735	\$ 735	\$ 735	\$ 735	\$ 735	\$ 735	\$ 735	\$ 735	\$ 735	\$ 735	\$ 735	\$ 8,820
7020	Contingency													\$ -
8000	Monthly Reserve Transfer	\$ 3,151	\$ 3,151	\$ 3,151	\$ 3,151	\$ 3,151	\$ 3,151	\$ 3,151	\$ 3,151	\$ 3,151	\$ 3,151	\$ 3,151	\$ 3,151	\$ 37,812
8010	Reserve Interest Transfer													\$ 146,940
	Total Expenses	\$ 10,896	\$ 11,778	\$ 13,153	\$ 12,366	\$ 17,264	\$ 13,030	\$ 11,356	\$ 10,684	\$ 12,319	\$ 11,606	\$ 10,909	\$ 11,579	\$ 146,940

p7, e-2



**How doers
get more done..**

245 RIVERSIDE ST
PORTLAND, ME 04103 (207)761-0600

2401 00061 04103 04/30/24 05:12 PM
SALE SELF CHECKOUT

0000-999-533 BAG FEE .05 <B,U> 0.05N
BAG FEE - 5 CENTS

-----Military Discount-----
010306011037 4 OZ. GROUT <A> <M> 6.67

QEP GROUT SEALER BRUSH APPLICATOR
MAX REFUND VALUE \$6.00

753927513503 IMPREGNATOR <A> <M> 28.47

511 IMPREGNATOR SEALER 160Z
MAX REFUND VALUE \$28.63

Military Discount -3.51

SUBTOTAL 31.68

SALES TAX 1.74

TOTAL \$33.42

XXXXXXXXXXXX7578 VISA

USD\$ 33.42

TA

AUTH CODE 610341/6615848

Chip Read

AID A0000000031010

VISA CREDIT

<U> - NON-DISCOUNTABLE ITEM

<M> = Military Appreciation

2401 04/30/24 05:12 PM



2401 61 04103 04/30/2024 2639

RETURN POLICY DEFINITIONS
POLICY ID DAYS POLICY EXPIRES ON

A 1 90 07/29/2024

B 2 NO REFUNDS

DID WE NAIL IT?

Take a short survey for a chance to WIN
A \$5,000 HOME DEPOT GIFT CARD

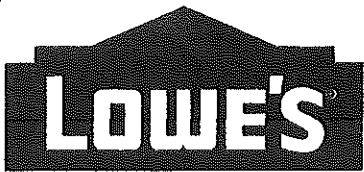
Opine en español

www.homedepot.com/survey

User ID: H89 10896 8556
PASSWORD: 24230 8495

Entries must be completed within 14 days
of purchase. Entrants must be 18 or
older to enter. See complete rules on
website. No purchase necessary.

*Grout Sealer / Applicator
for
135 Sheridan
New Kitchen Tile Backsplash*



Order #100901122241538155
Placed April 30, 2024 | \$4.25

Ready For Pickup

 Ready for Pickup Today

 Portland Lowe's

1058 Brighton Avenue,
Portland, ME, 04102

White Sealer Applicator

~~\$4.48~~ \$4.03

Item #643483 Model #APLTRAY8

 Saved \$0.45 with Military Discount

\$4.48 /ea. QTY 1

Payment Method

Master Card

**** * 1712

Matthew Davies

56 Marlu St

(207) 749-8214

135 Shandon

Order Summary

Subtotal	\$4.03
Tax	\$0.22
Total Billed	\$4.25

Ap One QS



Mastercard •••• 1712

\$111.94

Feb 17, 2024

Billing address

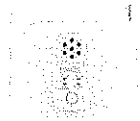
Matthew Davies

56 Marlu Street

Westbrook Maine 04092

United States

+12077498214



10-Year 100% Battery-Powered Natural Gas + Carbon Monoxide Alarm

\$101.99

Subtotal

\$101.99

Shipping

\$9.95

Total

USD **\$111.94**

[Refund policy](#) [Privacy policy](#) [Terms of service](#)

p. 7, 12-3a

← **Order #1278**

Confirmed Feb 17, 2024

Buy again

Arrived Feb 22, 2024

UPS 1Z0014Y80393811570

📍 **Delivered**

Feb 22, 2024

This shipment has been delivered.

Show details ▾

Track order with Shop

News and offers

You'll receive marketing emails. You can unsubscribe at any time.

Email me with news and offers

Contact information

Matthew Davies
mdavies754@gmail.com

Shipping address

Matthew Davies
56 Marlu Street
Westbrook Maine 04092
United States
+12077498214

Shipping method

Standard

Payment

p7 12-36

Final Details for Order #114-7463793-6947458

Print this page for your records.

Order Placed: January 29, 2024

Amazon.com order number: 114-7463793-6947458

Order Total: \$346.91

Shipped on January 31, 2024

Items Ordered

Price

1 of: *INSINKERATOR Garbage Disposal EZ Connect 3-Foot Power Cord for EZ Connect Power and Advanced Series Continuous Feed Food Waste Disposer Models, CRD-EZ* \$16.98

Sold by: Amazon.com Services, Inc

Supplied by: Other

Condition: New

1 of: *InSinkErator DWC-00 Plumbing Equipment* \$10.53

Sold by: Amazon.com Services, Inc

Supplied by: Other

Condition: New

1 of: *Frigidaire FRPAMRAF Pure Air Replacement Air Microwave Filter* \$42.08

Sold by: Amazon.com Services, Inc

Supplied by: Other

+ Tax
\$42.08
2.31
44.39

Condition: New

1 of: *E-Z Ink (TM Compatible Ink Cartridge Replacement for Canon PGI-280XXL PGI 280 XXL Compatible with PIXMA TR7520 TR8520 TS6120 TS6220 TS8120 TS8220 TS9120 TS9520 TS9521C Printer (4 PGBK)* \$29.99

Sold by: YUN-STORE (seller profile)

Supplied by: YUN-STORE (seller profile)

Condition: New

Shipping Address:

Matthew F Davies
56 MARLU ST
WESTBROOK, ME 04092-4627
United States

Shipping Speed:

FREE Shipping

Shipped on January 31, 2024

Items Ordered

Price

1 of: *InSinkErator EVOLUTION 0.75HP 3/4 HP, Advanced Series EZ Connect Continuous Feed Food Waste Garbage Disposal, Gray* \$232.26

Sold by: Amazon.com Services, Inc

Supplied by: Other

Condition: New

Shipping Address:

Matthew F Davies
56 MARLU ST
WESTBROOK, ME 04092-4627



Pine State Services
3 Eisenhower Drive
Westbrook, ME 04092
(207) 883-1200
www.PineStateServices.com

Invoice 173458
Invoice Date 2/23/2024
Completed Date 2/23/2024
Customer PO
Payment Term Due Upon Receipt
Due Date 2/23/2024

Billing Address
Matthew Davies
135 Sheridan Street
Portland, ME 04101 USA

Job Address
Matthew Davies
135 Sheridan Street
Portland, ME 04101 USA

Description of Work

Unit #102 Annual maintenance gas furnace. Fired furnace. Checked gas pressure. Inspected flame rod and igniter. Tested electrical wiring and safeties. Inspected flue exhaust and air intake for signs of damage or leaks. Tested condensate. Replaced air filter. 12x20x1

Task #	Description	Quantity	Your Price	Your Total
Z-GAS-59 Furnace	PM3D - Gas Furnace Cleaning & Tune-up	1.00	\$251.60	\$251.60

Member Savings	\$44.40
Sub-Total	\$251.60
Tax	\$0.00
Total Due	\$251.60
Balance Due	\$251.60

Thank you for choosing Pine State Services.

I knowingly consent to receive notices and disclosures electronically and agree to use electronic signatures as evidence of my binding intent. I agree the electronic signatures appearing on this service order are the same as handwritten signatures for the purposes of validity, enforceability, and admissibility.

*pd 2/24/23
by Cap One Venture*

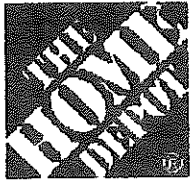
2/23/2024

BY SIGNING BELOW, I AGREE TO THE TERMS OF THIS SERVICE ORDER AND THE FOLLOWING SERVICE EXPERTS GENERAL TERMS AND CONDITIONS. Terms and Conditions. IF APPLICABLE, I HAVE BEEN NOTIFIED VERBALLY OF MY RIGHT TO CANCEL AND ANY ADDENDUM DESCRIBING MY RIGHTS UNDER STATE LAW. You, the buyer, may cancel this transaction at any time prior to midnight of the third business day after the date of this transaction. See the following notice of cancellation form for an explanation of this right. [LINK TO NOTICE OF CANCELLATION FORM]

2/23/2024

Capital Improvement and Expense Worksheet
Calendar Year 2024
135 Sheridan Street, Unit 102
6/9/2025

Capital Improvement	Cost	Interest Allowance	Period	Total Principal & Interest - Life of Improvement	Total Interest Life of Improvement	Annual Amortized Cost	Monthly Amortized Cost	# Units	Monthly Cost per Unit
Kitchen Sink/Faucet/Plumbing	\$1,359.00	8.85%	10	\$1,462.62	\$103.62	\$146.26	\$12.19	1	\$12.19
Granite Countertops w/Brackets	\$5,696.00	8.85%	10	6,130.30	434.30	613.03	\$51.09	1	51.09
Stovetop Vent to Exterior	\$3,560.00	8.85%	10	3,831.44	271.44	383.14	\$31.93	1	31.93
Kitchen Backsplash/Tile	\$882.00	8.85%	10	949.25	67.25	94.92	\$7.91	1	7.91
Total 2024 Improvements	\$11,497.00			\$12,373.60	\$876.60	\$1,237.36	\$103.11		\$103.11



**How doers
get more done.**

245 RIVERSIDE ST
PORTLAND, ME 04103 (207)761-0600

2401 00051 72069 02/02/24 04:13 PM
SALE SELF CHECKOUT

-----Military Discount-----
841712131251 100-WATT EQU <A> <M> 16.98
ECS (100W) A19 FRO DL 4PK DIM
MAX REFUND VALUE \$15.28
034449996716 GREYDON SS <A> <M> 299.00
GREYDON TOUCH P/D KITCHEN FAUCET SS
MAX REFUND VALUE \$269.10
Military Discount -31.60

for Condo

for Condo

SUBTOTAL 284.38
SALES TAX 15.64
TOTAL \$300.02

XXXXXXXXXXXX1712 MASTERCARD

USD\$ 300.02

AUTH CODE 05028P/4513906

TA

Chip Read

AID A00000000041010

CAPITAL ONE

cc pd 2/6/24

<M> = Military Appreciation

2401 02/02/24 04:13 PM



2401 51 72069 02/02/2024 3062

RETURN POLICY DEFINITIONS
POLICY ID DAYS POLICY EXPIRES ON
A 1 90 05/02/2024

DID WE NAIL IT?

Take a short survey for a chance TO WIN
A \$5,000 HOME DEPOT GIFT CARD

Opine en español

www.homedepot.com/survey

User ID: H89 146828 144478
PASSWORD: 24102 144427

Entries must be completed within 14 days
of purchase. Entrants must be 18 or
older to enter. See complete rules on
website. No purchase necessary.

*Kitchen
Faucet*

*Kitchen Faucet
Kitchen Sink
plumbing
Disposal Mount*

*300.02 pg 1
426.33 pg 2
814.35 pg 3
18.97 pg 4*

1359.67

*pg 4 L1 \$ 914.00
pg 4 L1 \$ 445.00
L1 \$ 1359.00*

P 14 L1

ORDER #WM58856767

New Sink
135 Sherrin



What can we help you find today?



Portland 9PM

04103

Order Number: WM58856767

Order Total: \$426.33

Pick Up

Product Information

Item	Qty	Price
Ruvati 16-Gauge Stainless Steel 32 in. Single Bowl Undermount Workstation Kitchen Sink with Accessories Model #RVH8301	1	\$404.1
Store SKU #1004361316		

Payment Information

Billing Address
Matthew Davies
56 Marlu St
WESTBROOK, ME 04092

Payment Details
Subtotal \$449
Sales Tax \$22.23
Order Total \$426.33

Payment Method
MA | Ending in 1712

cc pd 2/3/24

Date Ordered: January 29, 2024

Order Total: \$426.33

Payment: - 1712

Order Origin: Online

Pick Up



Shop All



Services



DIY



Matthew

p 14 21 M40

2



Pine State Services
3 Eisenhower Drive
Westbrook, ME 04092
(207) 883-1200
www.PineStateServices.com

Invoice 84879501
Invoice Date 4/8/2024
Completed Date 4/8/2024
Customer PO
Payment Term Due Upon Receipt
Due Date 4/8/2024

Billing Address
Matthew Davies
135 Sheridan Street
Portland, ME 04101 USA

Job Address
Matthew Davies
135 Sheridan Street
Portland, ME 04101 USA

Description of Work

Customer had new sink installed, installed new customer supplied delta smart touch kitchen faucet. Customer also had used garbage disposal, installed new disposal plugged in ran disposal. Turned on water checked for leaks and operation.

Task #	Description	Quantity	Your Price	Your Total
Trip	Charge to send a qualified professional.	1.00	\$0.00	\$0.00
Z-1YRPC Monthly	Preferred Customer Club Monthly Membership	1.00	\$10.00	\$10.00
	-Priority Scheduling -Emergency Services 24/7 -Discounted Rates -1 Year Parts & Labor on all Service Repairs -No Trip Charges ever			
Laun-011	Customer Supplied Fixtures - Level 3. Includes time and expertise to install customer supplied fixture. Also includes incidental items such as Teflon tape, pipe dope, plumbers putty, or silicone sealants. DOES NOT INCLUDE: any additional components like stops, water connections, adapters, or piping. ADD appropriate repairs for additional components that may be needed.	1.00	\$604.35	\$604.35

Paid On	Type	Memo	Amount
4/8/2024	Credit Card		\$614.35
<i>Install plumbing for New Sink, new faucet</i> <i>pd 4/8/23 Cap One Venture</i>			Member Savings \$205.65
			Sub-Total \$614.35
			Tax \$0.00
			Total Due \$614.35
			Payment \$614.35
		Balance Due	\$0.00

Thank you for choosing Pine State Services.

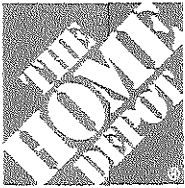
I knowingly consent to receive notices and disclosures electronically and agree to use electronic signatures as evidence of my binding intent. I agree the electronic signatures appearing on this service order are the same as handwritten signatures for the purposes of validity, enforceability, and admissibility.

4/8/2024

BY SIGNING BELOW, I AGREE TO THE TERMS OF THIS SERVICE ORDER AND THE FOLLOWING SERVICE EXPERTS GENERAL TERMS AND CONDITIONS. Terms and Conditions. IF APPLICABLE, I HAVE BEEN NOTIFIED VERBALLY OF MY RIGHT TO CANCEL AND ANY ADDENDUM DESCRIBING MY RIGHTS UNDER STATE LAW. You, the buyer, may cancel this transaction at any time prior to midnight of the third business day after the date of this transaction. See the following notice of cancellation form for an explanation of this right. [LINK TO NOTICE OF CANCELLATION FORM]

P 14 21 MLD

17 171 d



135 SHERIDAN

Receipt # 2401-61-64438

Invoice Number(s) # 1613695

In-Store Purchase

Order Origin: #2401, Portland

Ordered
4/5/2024

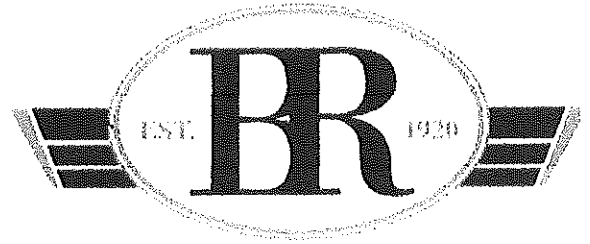
Item Description	Qty	Unit Price	Discount	Net Unit Price	Pre Tax Amount
Quick Lock Mount in Chrome for InSinkErator Garbage Disposal SKU 641654	1	\$19.98	\$2.00	\$17.98	\$17.98
Subtotal					\$17.98
Discount					\$-2.0
Shipping					\$0
Delivery Charge					\$0
Sales Tax					\$0.99
Order Total					\$18.97

Printed On: June 13, 2025 13:28:39 EDT

Page 1 of 1

BLUE ROCK INDUSTRIES

P.O. BOX 1046
Westbrook, ME 04098
+1 2077726770

**INVOICE**

DEL TO
Matthew Davies
135 Sheridan St., Unit102
Portland, ME 04101

SHIP TO
Matthew Davies
135 Sheridan St., Unit102
Portland, ME 04101

INVOICE	DATE	TERMS	DEL DATE
81915R	04/08/2024	Net 10	04/18/2024
DESCRIPTION	QTY	RATE	AMOUNT
Volga Blue polished granite kitchen counters with splash and island top	1	2,525.84	2,525.84T
Double laminate removal	1	632.48	632.48
Template & installation	1	1,517.70	1,517.70
SUBTOTAL			4,676.02
TAX			138.92
TOTAL			4,814.94
PAYMENT			2,415.51
BALANCE DUE			\$2,399.43

Copyright © BLUE ROCK INDUSTRIES 2024

1/22/24 pd CC
pd

See pg 2
showing complete payment

pg 3 1+2 Granite Countertop + Install
pg 3 Countertop Brackets + Install
4814.94
880.63
5695.57

p 14 L2-1

Bill to

Matthew Davies
135 Sheridan St., Unit102
Portland, ME 04101

Ship to

Matthew Davies
135 Sheridan St., Unit102
Portland, ME 04101

Terms

Net 10

Volga Blue polished granite kitchen counters with splash and island top

1 X \$2,525.84

\$2,525.84T

Double laminate removal

1 X \$632.48

\$632.48

Template & installation

1 X \$1,517.70

\$1,517.70

Subtotal	\$4,676.02
Tax	\$138.92
Total	\$4,814.94
Payment	\$4,814.94
Balance due	\$0.00

Contact BLUE ROCK INDUSTRIES to pay.

Please print and pay

p14, 42-2

DMCPainting
Remodeling Flooring

A division of Dirigo Management Company

DMC Painting Remodeling & Flooring

One City Center, 4th Floor

Portland, ME 04101-6409

USA

Bill To:Matthew Davies
56 Marlu Street
Westbrook, ME 04092**INVOICE**

Invoice Number: 29811

Invoice Date: Apr 23, 2024

Voice: (207) 871-1080

Fax: (207) 871-7189

www.dirigomgmt.com

Quantity	Item	Description	Unit Price	Amount
5.50	Owner Labor	3/12- 4/3/24- 102- 135 Sheridan- Find, purchased & installed brackets to support granite countertop.	90.00	495.00
1.00	Owner Supplies	adhesive, boards	49.18	49.18
1.00	Owner Supplies	brackets	307.20	307.20
1.00	Owner FF	Fuel fee	15.00	15.00
19.00	Owner Mileage	Mileage	0.75	14.25

paid by check #1076
5/2/24To pay by credit card please
call 207-871-1080 & ask for
Megan Swett!

Invoice Amount	880.63
Sales Tax	
Payment/Credit Applied	
TOTAL Due Upon Receipt	880.63

Tear/cut at perforation

Make checks payable to:DMC Painting Remodeling & Flooring
One City Center, 4th Floor
Portland, ME 04101-6409
USAPlease note, invoices that are 30 days
past due are subject to a 1.5% late fee

Customer ID: Matthew Davies

Invoice Date 4/23/24

Invoice # 29811

Total Due **\$880.63**Matthew Davies
56 Marlu Street
Westbrook, ME 04092

Please write Invoice # on your check or enclose this remittance stub with your payment.

p14 L2-3

p3



A division of Dirigo Management Company
DMC Painting Remodeling & Flooring
One City Center, 4th Floor
Portland, ME 04101-6409
USA

INVOICE

Invoice Number: 30547
Invoice Date: Jul 23, 2024

Bill To:

Matthew Davies
56 Marlu Street
Westbrook, ME 04092

Voice: (207) 871-1080
Fax: (207) 871-7189

www.dirigomgmt.com

35193

Quantity	Item	Description	Unit Price	Amount
1.00	Owner-Contract Work	Contract Work~ Kitchen vent install~ 135 Sheridan~ proposal #35193	3,560.00	3,560.00

To pay by credit card please
call 207-871-1080 & ask for
David DiConzo!

Invoice Amount	3,560.00
Sales Tax	
Payment/Credit Applied	
TOTAL Due Upon Receipt	3,560.00

Tear/cut at perforation

Make checks payable to:

DMC Painting Remodeling & Flooring
One City Center, 4th Floor
Portland, ME 04101-6409
USA

Please note, Invoices that are 30 days
past due are subject to a 1.5% late fee

Customer ID: Matthew Davies

Invoice Date 7/23/24

Invoice # 30547

Total Due **\$3,560.00**

Matthew Davies
56 Marlu Street
Westbrook, ME 04092

Please write Invoice # on your check or enclose this remittance stub with your payment.

P14 L#3

INSTALLATION #1

(Continued)

REF #102

OPTION	DESCRIPTION	QTY	UM	TAX	PRICE EACH	EXTENSION
1	Customer indicated in reservation that they did not have heat present. Customer must ensure that heat is running for at least three days at a minimum temperature of 65 degrees before installation can be scheduled.	1.00	EA	N	\$0.00	\$0.00
2	Customer indicated in reservation that they did not have electricity. Customer must ensure that they have electricity before installation can be scheduled.	1.00	EA	N	\$0.00	\$0.00
3	1 appliances in BACKSPLASH1	1.00	EA	N	\$0.00	\$0.00
4	Backsplash Pattern 48	1.00	EA	N	\$0.00	\$0.00
INSTALLATION SITE NAME: DAVIES, MATT						INSTALL LABOR CHARGE: \$734.00
ADDRESS: 56 Marlu Street						TRIP CHARGE: \$0.00
CITY: Westbrook STATE: ME ZIP: 04092						CREDIT FOR DEPOSIT/MEASURE: \$0.00
COUNTY: CUMBERLAND SALES TAX RATE: 0.000 TAX: Merchandise - N LABOR - N						INSTALL TOTAL DUE: \$700.22
PHONE: (207) 7498214 ALTERNATE PHONE: (207) 7498214						

INSTALLER SPECIAL INSTRUCTIONS: Measure #19112614 Calc DateTime 04/12/24 11:54:04**BASIC INSTALLATION LABOR INCLUDES:**

* INSTALL LABOR SERVICES ONLY. CUSTOMER IS RESPONSIBLE FOR PROVIDING TILE PRODUCT AND PRODUCT MATERIAL (E.G. ACCENT OR TRIM PIECES, BACKER BOARD, THIN-SET MORTAR, GROUT, ETC.)

* BASIC INCLUDES SITE PREP / MINOR WALL REPAIR (2 SF MAX), CUTTING OF TILE TO PROPERLY FILL AREA, PRE-LAYOUT OF TILE PATTERN DESIGN, SECURE BACKER BOARD, APPLICATION OF ADHESIVE, ALLOW TO CURE / DRY (24 HR), PRE-SEAL TILE (IF NECESSARY),

* APPLYING GROUT, TILE CLEANUP, SEAL/FINISH, FINAL CLEANUP OF ALL JOB RELATED DEBRIS, AND INSPECTION WITH CUSTOMER.

* CUSTOMER MUST SELECT FROM PRE-DETERMINED PATTERN DESIGN (REF MYAPRON TILE BACKSPLASH PATTERN BOOK)

* MEASURE FEE WILL BE DEDUCTED FROM THE INSTALLATION LABOR TOTAL AT TIME OF PURCHASE.

END OF INSTALL #1**TOTAL CHARGES OF ALL MERCHANDISE & SERVICES**

Policy Id (PI):

;

ORDER TOTAL	\$1,018.44
SALES TAX	\$9.43
TOTAL	\$1,027.87
BALANCE DUE	\$0.00

*** CONTINUED ON NEXT PAGE ***

Less Person + Home Items - pg1 (180.94)

Backsplash Install plus Deposit pg4 846.93

Total Backsplash 881.93

pg 1

INSTALLER DELIVERY #1

(Continued)

REF #102

R06	0000-386-499	1.00	EA	OmniGrip 1 Gal. (4 qt.) Premium Lightweight Adhesive for Tile and Stone /		N	\$29.86	\$29.86*
S/O - MDSE TO BE DELIVERED:				REF # S03	ESTIMATED ARRIVAL DATE: 04/30/2024		P.O. #01504218	
REF #	SKU	QTY	UM	DESCRIPTION	PI	TAX	PRICE EACH	EXTENSION
S0303	1004-159-487	3.00	CA	95806 / 1004-159-487 - 3 x 6 Blanco Rustico White Style: 9 / Blanco Rustico White 3 in. x 6 in. Glossy Ceramic Wall Tile (5.38 sq. ft./Case)		N	\$21.74	\$65.22*
							MERCHANDISE TOTAL:	\$146.71
DELIVERY INFORMATION:				DELIVERY DATE: INSTALLER WILL SCHEDULE				
INSTALLER WILL DELIVER MDSE TO:				SITE OF INSTALLATION #102 AT TIME OF INSTALLATION.				
NOTE: UPON RECEIPT OF ALL S/O MERCHANDISE - INSTALLER WILL CALL CUSTOMER TO SCHEDULE INSTALL DATE.								

INSTALLATION #1

REF # 102

ESTIMATED INSTALL BEGIN DATE: 04/19/2024

ESTIMATED INSTALL END DATE: 07/18/2024

MERCHANDISE TO BE INSTALLED:

REF #	SKU	QTY	UM	DESCRIPTION
R04	1001-480-765	1.00	EA	Commercial #381 Bright White 10.1 oz. Silicone Caulk
R05	1001-481-680	1.00	EA	Prism #381 Bright White 17 lb. Ultimate Performance Rapid Setting Grout
R06	0000-386-499	1.00	EA	OmniGrip 1 Gal. (4 qt.) Premium Lightweight Adhesive for Tile and Stone
S0303	1004-159-487	3.00	CA	Blanco Rustico White 3 in. x 6 in. Glossy Ceramic Wall Tile (5.38 sq. ft./Case)

BASIC INSTALLATION LABOR:

SKU	DESCRIPTION	QTY	UM	TAX	PRICE EACH	EXTENSION
0000-285-632	TILE BACKSPLASH-NAT / 1286 BACKSPLASH INSTALL 25 SF	1.00	EACH	N	\$697.00	\$697.00

OPTIONAL LABOR SELECTED INCLUDES:

OPTION	DESCRIPTION	QTY	UM	TAX	PRICE EACH	EXTENSION
8	0057 APPLIANCE - REMOVE AND REPLACE (WE DO NOT DISCONNECT ORRECONNECT GAS OR WATER) /	1.00	EA	N	\$37.00	\$37.00

CUSTOM LABOR SELECTED INCLUDES:

*** CONTINUED ON NEXT PAGE ***

P14, L4.3



SPECIAL SERVICES CUSTOMER INVOICE

Store 2401 PORTLAND
245 RIVERSIDE STREET
PORTLAND, ME 04103

Phone: (207) 761-0600
Salesperson: Online
Reviewer:

Page 1 of 4

No. H2401-166106

SOLD TO	Name DAVIES MATTHEW		Phone 1 (207) 749-8214	
	Address 56 MARLU ST		Phone 2	
	Company Name			
	City WESTBROOK		Job Description H2401-166106	
	State ME		Zip 04092	County CUMBERLAND

REPRINT

2025-06-13 12:46

CARRY OUT MERCHANDISE

MERCHANDISE AND SERVICE SUMMARY

We reserve the right to limit the quantities of merchandise sold to customers

REF # W07 SKU # 0000-515-664 The items listed in this section will be carried out of the store by the customer at time of sale.

STOCK MERCHANDISE CARRIED OUT:

REF #	SKU	QTY	UM	DESCRIPTION	PI	TAX	PRICE EACH	EXTENSION
R07	0000-494-201	1.00	EA	Turf Builder 40.05 lbs. 15,000 sq. ft. Halts Crabgrass Preventer with Lawn Fertilizer /		Y	\$64.77	\$64.77*
R08	1006-938-496	1.00	EA	Turf Builder Triple Action 33.94 lbs. 12,000 sq. ft. Lawn Fertilizer with Weed Control and Crabgrass Preventer /		Y	\$63.87	\$63.87*
R09	0000-902-182	1.00	EA	20 lb. 5,000 sq. ft. Lawn Moss Killer Granules /		Y	\$16.17	\$16.17*
R10	1010-555-088	1.00	BG	Turf Builder Triple Action For Moss Control, 20 lbs. Moss Killer and Lawn Fertilizer /		Y	\$26.70	\$26.70*

MERCHANDISE TOTAL: \$171.51

END OF CARRY OUT MERCHANDISE - REF #W07

INSTALLER DELIVERY #1

REF # I02

STOCK MERCHANDISE TO BE DELIVERED:

REF #	SKU	QTY	UM	DESCRIPTION	PI	TAX	PRICE EACH	EXTENSION
R04	1001-480-765	1.00	EA	Commercial #381 Bright White 10.1 oz. Silicone Caulk /		N	\$16.58	\$16.58*
R05	1001-481-680	1.00	EA	Prism #381 Bright White 17 lb. Ultimate Performance Rapid Setting Grout /		N	\$35.05	\$35.05*

*** CONTINUED ON NEXT PAGE ***

Check your current order status online at
www.homedepot.com/orderstatus

019.24-4



SPECIAL SERVICES CUSTOMER INVOICE

Store 2401 PORTLAND
245 RIVERSIDE STREET
PORTLAND, ME 04103

Phone: (207) 761-0600
Salesperson: HDSCAUT
Reviewer:

Page 1 of 1 No. H2401-166105

SOLD TO	Name	Davies Matthew			Home Phone
	Address	135 SHERIDAN ST UNIT 102, Unit 102			Work Phone (207) 749-8214
	Company Name				
	City	Portland			Job Description FOR H2401-166106
	State	ME	Zip	04101	County CUMBERLAND

REPRINT

2025-06-13 13:05

MEASUREMENT #1		MERCHANDISE AND SERVICE SUMMARY		We reserve the right to limit the quantities of merchandise sold to customers		
REF # M01		FROM INSTALLATION # H2401-166106-101				
REF #	SKU	QTY	UM	DESCRIPTION	TAX PRICE EACH EXTENSION	
M01	0000-285-632	1.00	EA	TILE BACKSPLASH-NAT	N \$35.00 \$35.00	
MEASUREMENT SITE:		CUSTOMER NAME: Davies, Matthew				
ADDRESS: 135 SHERIDAN ST UNIT 102, Unit 102		CITY: Portland		TRIP CHARGE: \$0.00		
STATE: ME ZIP: 04101 COUNTY: CUMBERLAND		SALES TAX RATE: 0.000		DEPOSIT/MEASURE TOTAL: \$35.00		
PHONE: (207) 749-8214						
MEASURE SPECIAL INSTRUCTIONS:						
END OF MEASUREMENT						
TOTAL CHARGES OF ALL MERCHANDISE & SERVICES						
The Home Depot reserves the right to limit / deny returns. Please see the return policy sign in stores for details.					ORDER TOTAL	\$35.00
					SALES TAX	\$0.00
					TOTAL	\$35.00
					BALANCE DUE	\$0.00
END OF ORDER No. H2401-166105						

NOT VALID FOR MERCHANDISE CARRIED OUT

Check your current order status online at
www.homedepot.com/orderstatus

pg 4

Capital Improvement and Expense Worksheet
 Calendar Year 2025 In-Process
 135 Sheridan Street, Unit 102
 6/9/2025

ALL ITEMS TO BE COMPLETED BY JUNE 30, 2025

Capital Improvement			Cost	Interest Allowance	Period	Total Principal & Interest - Life of Improvement	Total Interest Life of Improvement	Annual Amortized Cost	Monthly Amortized Cost	# Units	Monthly Cost per Unit
New Gas Range w/Install	P17, L1-1, 1-2, 1-3		\$1,525.50	8.85%	5	\$1,582.59	\$57.09	\$316.52	\$26.38	1	\$26.38
Nat Gas Pipe Relocation w/construction	p17, L2	Pending Invoice	\$750.00	8.85%	10	\$807.18	\$57.18	\$80.72	\$6.73	1	\$6.73
New Microwave w/Install&Labor	p17, L3-1, 3-2	Pending Labor Invoice	\$797.13	8.85%	5	\$826.96	\$29.83	\$165.39	\$13.78	1	\$13.78
New Refrigerator w/Install	p17, L4		\$1,280.11	8.85%	5	1,328.02	47.91	265.60	\$22.13	1	22.13
New Dishwasher w/removal & Install	p17, L5-1, 5-2	Pending Labor Invoice	\$941.00	8.85%	5	976.21	35.21	195.24	\$16.27	1	16.27
Plumbing rework for Dishwasher	p17, L6-1		\$394.20	8.85%	10	\$424.26	\$30.06	\$42.43	\$3.54	1	\$3.54
Door Hardware & Door Realignment&Labor	p17, L7-1, 7-2	Pending Labor Invoice	\$496.32	8.85%	10	\$534.16	\$37.84	\$53.42	\$4.45	1	\$4.45
Kitchen Backsplash Update (Estimate)	p17, L8-1	Estimate	\$400.00	8.85%	10	\$430.50	\$30.50	\$43.05	\$3.59	1	\$3.59
Bedroom Carpeting	p17, L9-1		\$1,265.11	8.85%	5	1,312.45	47.34	262.49	\$21.87	1	21.87
Bathroom Flooring	p17, L10-1		\$1,693.43	8.85%	5	1,756.80	63.37	351.36	\$29.28	1	29.28
New Blinds (1)	p17, L11-1		\$190.05	8.85%	5	197.16	7.11	39.43	\$3.29	1	3.29
Painting (Estimate)	p17, L12-1	Pending Invoice	\$4,000.00	8.85%	5	4,149.69	149.69	829.94	\$69.16	1	69.16
Other Repair Work											
Total 2025 Improvements			\$13,732.85			\$14,325.99	\$593.14	\$2,645.59	\$220.47		\$220.47

pg 17 L1-1

Ship To:

Matthew Davies
135 Sheridan St
Portland, ME 04101

Ordered

6/11/2025

Backordered

6/10/2025

Item Description	Qty	Unit Price	Discount	Net Unit Price	Pre Tax Amount
Gallery 24 in. Top Control Built in Tall Tub Dishwasher in Stainless Steel with 7-Cycles and 50 Minute Normal Wash SKU 1013193302	1	\$799.00	\$171.00	\$628.00	\$628.00
SKU 205954	1	\$26.98	\$0.00	\$26.98	\$26.98
SKU 589984	1	\$179.00	\$0.00	\$179.00	\$0.01
SKU 174602	1	\$50.00	\$0.00	\$50.00	\$50.00
Gallery 30 in. 5 Burner Freestanding Gas Range in Stainless Steel with True Convection and Air Fry SKU 1010459420	1	\$1499.00	\$401.00	\$1098.00	\$1098.00
SKU 174602	1	\$50.00	\$0.00	\$50.00	\$50.00
Gallery 36 in. 26 cu. ft. Standard Depth Side by Side Refrigerator in Smudge-Proof Stainless Steel, ENERGY STAR SKU 1006427644	1	\$1649.00	\$451.00	\$1198.00	\$1148.00
SKU 1001854188	1	\$17.98	\$0.00	\$17.98	\$17.98

\$1,148.00
 + Tax 63.14
 1,211.14
 + L1-2 224.40
 + L1-3 37.96
 1,525.50

Printed On: June 22, 2025 16:37:39 EDT

Page 2 of 3

pg 17 L1-1



Pine State Services
3 Eisenhower Drive
Westbrook, ME 04092
(207) 883-1200
www.PineStateServices.com

Invoice 169395362
Invoice Date 6/12/2025
Completed Date 6/12/2025
Customer PO
Payment Term Due Upon Receipt
Due Date 6/12/2025

Billing Address
Matthew Davies
135 Sheridan Street
Portland, ME 04101 USA

Job Address
Matthew Davies
135 Sheridan Street
Portland, ME 04101 USA

Description of Work

Connected new gas range to existing gas line. Checked fittings for leaks, and tested operation.

Task #	Description	Quantity	Your Price	Your Total
Trip	Charge to send a qualified professional.	1.00	\$0.00	\$0.00
Z-DiagMRL1	Diagnostic/Fault Location (w/Minor Repair): Level 1	1.00	\$224.40	\$224.40

Paid On	Type	Memo	Amount
6/12/2025	Credit Card		\$224.40

Member Savings	\$138.60
Sub-Total	\$224.40
Tax	\$0.00
Total Due	\$224.40
Payment	\$224.40
Balance Due	\$0.00

Thank you for choosing Pine State Services.

I knowingly consent to receive notices and disclosures electronically and agree to use electronic signatures as evidence of my binding intent. I agree the electronic signatures appearing on this service order are the same as handwritten signatures for the purposes of validity, enforceability, and admissibility.

6/12/2025

BY SIGNING BELOW, I AGREE TO THE TERMS OF THIS SERVICE ORDER AND THE FOLLOWING SERVICE EXPERTS GENERAL TERMS AND CONDITIONS. Terms and Conditions. IF APPLICABLE, I HAVE BEEN NOTIFIED VERBALLY OF MY RIGHT TO CANCEL AND ANY ADDENDUM DESCRIBING MY RIGHTS UNDER STATE LAW. You, the buyer, may cancel this transaction at any time prior to midnight of the third business day after the date of this transaction. See the following notice of cancellation form for an explanation of this right. [LINK TO NOTICE OF CANCELLATION FORM]

6/12/2025

I authorize Pine State Services to charge the agreed amount to my credit card provided herein. I agree that I will pay for this purchase in accordance with the issuing bank cardholder agreement.

P 14 2 1-2



**How doers
get more done.**

245 RIVERSIDE ST
PORTLAND, ME 04103 (207)761-0600

2401 00052 15298 06/12/25 07:09 AM
SALE SELF CHECKOUT

-----Military Discount-----
084691906094 4 FT. GAS RA <A> <M> 39.98
4 FT. GAS RANGE CONNECTOR KIT (106K
MAX REFUND VALUE \$35.98
Military Discount -4.00

SUBTOTAL 35.98
SALES TAX 1.98
TOTAL \$37.96

XXXXXXXXXXXX6173 HOME DEPOT USD\$ 37.96

AUTH CODE 012248/8520201 TA
Chip Read
AID A000000004999908490303 THD PLCC CON

PRO XTRA MEMBER STATEMENT

PRO XTRA ###-###-8214 SUMMARY

2025 PRO XTRA SPEND 06/11: \$1,679.87

Get the CREDIT LINE your business needs
PLUS earn Perks 4X FASTER when you join
Pro Xtra, register, & use your Pro Xtra
Credit Card. Apply and SAVE UP TO \$100.
Learn more at homedepot.com/credit

<M> = Military Appreciation

2401 06/12/25 07:09 AM



2401 52 15298 06/12/2025 6303

RETURN POLICY DEFINITIONS
POLICY ID DAYS POLICY EXPIRES ON
A 11 365 06/12/2026

4 A gas Range connector Kit
\$37.96

P 17 L 1-3



INVOICE

35 FODEN ROAD
SOUTH PORTLAND, ME 04106
Call/Text: (207) 874-4739
www.agrenappliance.com
www.agrenmattress.com

Date	Invoice Number #
06/07/2025	PS00063160
Schedule Date	Status
06/12/2025	CPU
Purchase Order	Page
	1

Bill To:	Ship To:
DAVIES, MATTHEW 56 MARLU ST WESTBROOK, ME 04092	2077498214 DAVIES, MATTHEW 56 MARLU ST WESTBROOK, ME 04092

Customer # (207) 749-8214	Payment Type PAID BEFORE DELIVERY	Invoice Type SOUTH PORTLAND SALE	Salesperson STEPHEN TAYLOR	Alt Phone #
------------------------------	--------------------------------------	-------------------------------------	-------------------------------	-------------

COMMENTS: SPORT CPU CALL WHEN IN

DIRECTIONS:

QTY	BRAND	MODEL / PART	DESCRIPTION	PRICE	EXT PRICE
			CUSTOMER MUST TAKE PRODUCT WITHIN 30 DAYS OF ARRIVAL. ITEMS NOT TAKEN WITHIN 30 DAYS WILL BE RETURNED TO THE VENDOR AND SUBJECT TO PRICING AND AVAILABILITY CHANGES. ***I UNDERSTAND IF I RESCHEDULE DELIVERY THE DAY BEFORE OR DAY OF THE SCHEDULED DELIVERY THERE WILL BE AN ADDITIONAL CHARGE OF \$79.99.*** X _____		
1	FRI	GMOS1266AF	1.2 CU. FT. LOW-PROFILE OVER-THE-RANGE MICROWAVE	566.00	566.00
		Payment	EPASS PAY CREDIT/DEBIT CARD	-	-
		Payment	EPASS PAY CREDIT/DEBIT CARD	597.13	597.13

For more information about your 5-year No-Lose Protection Plan offer please visit protection.agrenappliance.com. Product will not be ordered, and delivery will not be scheduled until the invoice is paid in full. Delivery windows are subject to change without notice. Payment on an order does not imply that Agren is physically holding appliances in its warehouse. Inspection of appliances must be done immediately for defects/damages. Agren is not responsible for damages noticed/reported at a later date. Product found to have cosmetic damage will be repaired, not replaced. Due to liability issues, Agren will only connect to copper or stainless refrigerator water supply lines that are properly installed and free of defects. Agren is not responsible for faulty/outdated plumbing or electrical. All non-stocked/clearance items sales are final---no returns. Any authorized return is subject to a 20% restocking fee. Used items cannot be returned. For commercial jobs: All deliveries to the site require a 4-week lead time. Elevators are required for deliveries above the second floor. Deliveries do not include the installation of built-in appliances unless a separate quote is requested.

SUB TOTAL	566.00
TAX	31.13
INVOICE TOTAL	597.13
DEPOSITS	597.13
BALANCE	0.00

PRICING SUBJECT TO CHANGE WITHOUT NOTICE UNTIL ORDER PAID IN FULL

CUSTOMER SIGNATURE _____

Customer has acknowledged above information and confirms order with no changes.

P 17 L 3-1

Ship To:

Matthew Davies
135 Sheridan St
Portland, ME 04101

Ordered

6/11/2025

Backordered

6/10/2025

Item Description	Qty	Unit Price	Discount	Net Unit Price	Pre Tax Amount
Gallery 24 in. Top Control Built in Tall Tub Dishwasher in Stainless Steel with 7-Cycles and 50 Minute Normal Wash SKU 1013193302	1	\$799.00	\$171.00	\$628.00	\$628.00
SKU 205954	1	\$26.98	\$0.00	\$26.98	\$26.98
SKU 589984	1	\$179.00	\$0.00	\$179.00	\$0.01
SKU 174602	1	\$50.00	\$0.00	\$50.00	\$50.00
Gallery 30 in. 5 Burner Freestanding Gas Range in Stainless Steel with True Convection and Air Fry SKU 1010459420	1	\$1499.00	\$401.00	\$1098.00	\$1098.00
SKU 174602	1	\$50.00	\$0.00	\$50.00	\$50.00
Gallery 36 in. 26 cu. ft. Standard Depth Side by Side Refrigerator in Smudge-Proof Stainless Steel, ENERGY STAR SKU 1006427644	1	\$1649.00	\$451.00	\$1198.00	\$1148.00
SKU 1001854188	1	\$17.98	\$0.00	\$17.98	\$17.98

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p 17 L4

Refrigerator Total 1,280.11

P17 25-1

Ship To:

Matthew Davies
135 Sheridan St
Portland, ME 04101

Ordered

6/11/2025

Backordered

6/10/2025

Item Description	Qty	Unit Price	Discount	Net Unit Price	Pre Tax Amount
Gallery 24 in. Top Control Built in Tall Tub Dishwasher in Stainless Steel with 7-Cycles and 50 Minute Normal Wash SKU 1013193302	1	\$799.00	\$171.00	\$628.00	\$628.00 Tax 34.54
SKU 205954	1	\$26.98	\$0.00	\$26.98	\$26.98 Tax 1.42
SKU 589984	1	\$179.00	\$0.00	\$179.00	\$0.01
SKU 174602	1	\$50.00	\$0.00	\$50.00	\$50.00
Gallery 30 in. 5 Burner Freestanding Gas Range in Stainless Steel with True Convection and Air Fry SKU 1010459420	1	\$1499.00	\$401.00	\$1098.00	\$1098.00
SKU 174602	1	\$50.00	\$0.00	\$50.00	\$50.00
Gallery 36 in. 26 cu. ft. Standard Depth Side by Side Refrigerator in Smudge-Proof Stainless Steel, ENERGY STAR SKU 1006427644	1	\$1649.00	\$451.00	\$1198.00	\$1148.00
SKU 1001854188	1	\$17.98	\$0.00	\$17.98	\$17.98

\$ 741.00

Printed On: June 22, 2025 16:37:39 EDT

Page 2 of 3

P17 25-1



Pine State Services
3 Eisenhower Drive
Westbrook, ME 04092
(207) 883-1200
www.PineStateServices.com

Invoice 170719270
Invoice Date 6/16/2025
Completed Date 6/16/2025
Customer PO
Payment Term Due Upon Receipt
Due Date 6/16/2025

Billing Address
Matthew Davies
135 Sheridan Street
Portland, ME 04101 USA

Job Address
Matthew Davies
135 Sheridan Street
Portland, ME 04101 USA

Description of Work

Customer has new dishwasher to be installed. Customer authorized work to be done today. Proceeded to connect electrical, water supply, and drain into garbage disposal. Once all connected found dishwasher won't push tight to back due to pice of wood in back which needs to be removed. Customer going to have contractor remove. Changed pricing to diagnostic level 2 due to dishwasher not fully set. Finally cleaned work area and collected payment.

Task #	Description	Quantity	Your Price	Your Total
Trip	Charge to send a qualified professional.	1.00	\$0.00	\$0.00
Z-DiagMRL2	Diagnostic/Fault Location (w/Minor Repair): Level 2	1.00	\$384.20	\$384.20

Paid On	Type	Memo	Amount
6/16/2025	Credit Card		\$384.20

Member Savings	\$166.80
Sub-Total	\$384.20
Tax	\$0.00
Total Due	\$384.20
Payment	\$384.20
Balance Due	\$0.00

Thank you for choosing Pine State Services.

I knowingly consent to receive notices and disclosures electronically and agree to use electronic signatures as evidence of my binding intent. I agree the electronic signatures appearing on this service order are the same as handwritten signatures for the purposes of validity, enforceability, and admissibility.

6/16/2025

BY SIGNING BELOW, I AGREE TO THE TERMS OF THIS SERVICE ORDER AND THE FOLLOWING SERVICE EXPERTS GENERAL TERMS AND CONDITIONS. Terms and Conditions. IF APPLICABLE, I HAVE BEEN NOTIFIED VERBALLY OF MY RIGHT TO CANCEL AND ANY ADDENDUM DESCRIBING MY RIGHTS UNDER STATE LAW. You, the buyer, may cancel this transaction at any time prior to midnight of the third business day after the date of this transaction. See the following notice of cancellation form for an explanation of this right. [LINK TO NOTICE OF CANCELLATION FORM]

6/16/2025

I authorize Pine State Services to charge the agreed amount to my credit card provided herein. I agree that I will pay for this purchase in accordance with the issuing bank cardholder agreement.



Customer Receipt

6/06/2025, 1:04 PM EDT

Sales Person CNR3327

Store Phone # (207) 761-0600

Store # 2401

Location 245 RIVERSIDE STREET, PORTLAND, ME 04103

Customer Information

MATTHEW DAVIES

(207) 749-8214

MDAVIES754@GMAIL.COM

56 MARLU ST

WESTBROOK, ME 04092



Order # H2401-197626

PO / Job Name Patio Door Parts

Will Call

Will Call Details
S/O ANDERSEN LOGISTICS

Estimated Arrival
32 Days
Customer will be notified when order
is ready for pickup

Alternate Pickup Person
MATTHEW DAVIES

Special Order Products

Model #

SKU #

Unit Price

Qty

Subtotal

S/O ANDERSEN LOGISTICS

01	S/O ANDERSEN LOGISTICS FWH/FWO, HANDLE, WHITE LH LEVER TRIBECA FWH/FWO, HANDLE, WHITE LH LEVER TRIBECA W/SCREWS REPL PN: 2579835 Catalog Version: 04/10/2025{#2} ◆ MILITARY DISCOUNT \$5.14 OFF EACH	NA	1000019269	\$51.30 / each \$46.25 / each	1	\$46.25
02	S/O ANDERSEN LOGISTICS FWH/FWO68, LOCK, MECHANISM 3 POINT REPL FWH/FWO68, LOCK, MECHANISM 3 POINT REPL PN: 2579771 Catalog Version: 04/10/2025{#1} ◆ MILITARY DISCOUNT \$20.80 OFF EACH	NA	1000019269	\$208.03 / each \$187.23 / each	1	\$187.23

90 DAY RETURN POLICY. The Home Depot reserves the right to limit / deny returns. Please see the return policy sign in the stores for details.

Pro Xtra 2025

Member Statement (as of 06/06)

Visit ProXtra: https://www.homedepot.com/c/Pro_Xtra

Pro Xtra Spend

\$288.25

Pro Xtra Savings

\$1,217.45

Payment Method

06/07/2025

4:00 PM EDT

The Home Depot 6173

Charged \$246.32

Subtotal

\$259.42

Discounts

-\$25.94

Sales Tax

\$12.84

Order Total

\$246.32

Balance Due

\$0.00

P 17 27

Proposal
VALID FOR 30 DAYS

Page 1

CLASSIC FLOORING
429 US Rt #1
P.O. Box 7004
Scarborough, ME 04070-7004
207-883-7847



Proposal #: 7920
Sale Date: 6/10/2025
Next Install:
Sales Rep: Amy Shea

SOLD TO: 207-749-9214

Matt Davies
135 Sheridan St. #102
Portland, ME 04101

SHIPPED TO

No Returns on Special Orders
Pick up hours M-F 9am - 4pm

MATERIALS		QUANTITY	PRICE	TOTAL
QS959 *Stock*	Stone Path	25.67 SqYrd	\$15.67	\$402.25
Carpet - Bedroom				
Pad *Stock*	8lb. Challenger 7/16	25.67 SqYrd	\$4.15	\$106.53
Paragon Tile Plus-15.83	Pebble	63.32 SqFt	\$5.75	\$364.09
LVT - Bathroom				
US101 6 Mil Black Poly	100 SF Roll	1.00 Each	\$19.00	\$19.00
Fiber Rock	4x4x1/4	4.00 Each	\$28.15	\$112.60
Kerdi Fix White 290 ML Cartridge	KERDIFIX/White	2.00 Each	\$31.18	\$62.36
Paragon Tile T-Mold	Pebble	1.00 Each	\$65.94	\$65.94
Paragon Reducer	Pebble	1.00 SqFt	\$65.95	\$65.95
LABOR		QUANTITY	PRICE	TOTAL
Carpet Job Minimum		1.00 Each	\$600.00	\$600.00
Carpet Removal & Disposal on Concrete		25.67 SqYrd	\$5.00	\$126.35
LVP/LVT Install w/6 Mil Poly		63.32 Each	\$3.50	\$221.62
Baseboards On/Off		28.00 LnFt	\$4.00	\$104.00
Wood Removal & Disposal Glue Down		63.32 SqFt	\$6.00	\$379.92
Underlayment Install 1/4" Staple & Prep		4.00 Each	\$45.00	\$180.00
Transitions per 8'		2.00 Each	\$40.00	\$80.00

Comments: Customer to move all furniture and toilet for installation.

SubTotal: \$2,892.61
Sales Tax: \$65.93
Total: \$2,958.54
Payments: \$0.00
Balance: \$2,958.54

Bedroom Carpet
Bathroom Tile

1265.11
1693.43

p 17 L9 and L10



Customer Receipt

6/02/2025, 1:41 PM EDT

Sales Person CNR3327

Store Phone # (207) 761-0600

Store # 2401

Location 245 RIVERSIDE STREET, PORTLAND, ME 04103

Customer Information

MATTHEW DAVIES

(207) 749-8214

MDAVIES754@GMAIL.COM

135 SHERIDAN

56 MARLU ST

WESTBROOK, ME 04092



Order # H2401-197264

PO / Job Name Blind

Delivery

Delivery Address

56 MARLU ST
WESTBROOK, ME 04092

Delivery Options

Vendor Direct
S/O SPRNG WNDW FASH BALI

Delivery Date

17 Days

Special Order Products

Model

SKU

Unit Price

Qty

Subtotal

S/O SPRNG WNDW FASH BALI

01	S/O SPRNG WNDW FASH BALI Light Filtering Cellular Shades CategoryName=Cellular Shades MILITARY DISCOUNT \$20.02 OFF EACH	NA	1003010297	\$200.16 / each \$180.14 / each	1	\$180.14
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90 DAY RETURN POLICY. The Home Depot reserves the right to limit / deny returns. Please see the return policy sign in the stores for details.

Pro Xtra 2025

Member Statement (as of 06/03)

Visit ProXtra: https://www.homedepot.com/c/Pro_Xtra

Pro Xtra Spend

\$125.00

Pro Xtra Savings

\$1,170.05

Payment Method

06/04/2025
3:29 PM EDT

The Home Depot 6173

Charged \$190.05

Subtotal	\$200.16
Discounts	-\$20.02
Sales Tax	\$9.91
Order Total	\$190.05
Balance Due	\$0.00

Consumer Price Index for All U
Original Data Value

Series Id: CUURS11ASA0
Not Seasonally Adjusted
Series Title: All items in Boston-Cami

Area: Boston-Cambridge-Newton, MA-NH
Item: All items
Base Period 1982-84=100
Years: 2013 to 2025

Year	CPI Annual	CPI Annual Inflation Rate	Fiscal Year Real Estate Taxes	RE Taxes Annual Inflation Rate	Excess of Real Estate Tax Above/-Below Inflation (CPI)	Condo Fee Inflation Rate
2013	251.139		2013	\$ 3,011.20	2013	\$ 197.00
2014	255.184	1.61%	2014	\$ 3,105.60	2014	\$ 200.00 1.52%
2015	256.715	0.60%	2015	\$ 3,200.00	2015	\$ 213.00 6.50%
2016	260.496	1.47%	2016	\$ 3,300.80	2016	\$ 244.00 14.55%
2017	267.033	2.51%	2017	\$ 3,377.60	2017	\$ 251.00 2.87%
2018	275.815	3.29%	2018	\$ 3,464.00	2018	\$ 266.00 5.98%
2019	281.082	1.91%	2019	\$ 3,596.80	2019	\$ 293.00 10.15%
2020	284.266	1.13%	2020	\$ 3,729.60	2020	\$ 297.00 1.37%
2021	293.521	3.26%	2021	\$ 3,729.60	2021	\$ 306.00 3.03%
2022	314.356	7.10%	2022	\$ 4,594.56	2022	\$ 325.00 6.21%
2023	326.016	3.71%	2023	\$ 4,813.86	2023	\$ 386.00 18.77%
2024	336.376	3.18%	2024	\$ 5,096.82	2024	\$ 406.00 5.18%
2025			2025	\$ 5,309.04	2025	\$ 448.00 10.34%

2013 to 2024	2013 to 2024	Total Excess RE Tax over CPI 2013 to 2024	2013 to 2024
133.94%	169.26%	35.32%	206.09%

Increase in Rent Based upon CPI	Increase in Rent Based upon RE Tax Increase	2013 to 2025
CPI Increase	RE Tax Increase	227.41%

1013 Rent Base	\$ 1,600.00	1013 Rent Base	\$1,600.00
Base Rent Adj for CPI	116.9% \$1,870.01	2013 to 2021	123.9% \$1,981.72
Base Rent Adj for CPI	133.9% \$2,143.04	2013 to 2024	169.3% \$2,708.19
		RE Tax Inflation to 2021	123.9%
		CPI + RE Inflation 2022	130.3%
		CPI Inflation 2023 to 2024	107.0%
		Proposed Total	161.2% \$ 2,578.44



Dylan Orr <dorr@portlandmaine.gov>

Request for Rent Board Approved Increased Rent

Matthew Davies <mdavies754@gmail.com>

Mon, Jun 23, 2025 at 4:16 PM

To: Dylan Orr <dorr@portlandmaine.gov>

Dylan,

Today I dropped off at your office the latest and last version of the 2025 Petition for Rent Increase. also included are the hardcopy spreadsheets (slightly revised) along with copies of invoices.

Again, please keep in mind that this single rental unit is not a low-income type of unit. But I am still required to abide by Portland's Rental regulations in any case.

The primary reason for filing is that I did not increase the rent to tenants at all for 8.5 years - from 2013 until 2021.

Because of that, I have not kept up to even close to market value for similar units. If I had made normal increases during that period, even just in line with CPI, I would not be so far below market as I am now. I would have been able to be close to market value even given the limitations that started in 2021 and 2022.

I have enclosed backup for improvements made in 2024 and have also attached backup for improvements made in 2025 for the invoices that I have received to date. Completion of the 2025 improvements should be completed in the next 2-3 weeks.

"NO, the improvements do not meet the threshold of 20% of market value of the individual property. However, given that improvements include all new appliances, new floors in the bedroom and bathroom, granite countertops, and other significant expenditures, all these items together should be taken into consideration when determining any rent increase. It's common sense. Total value of improvements in 2024 and 2025, **just for one unit**, approximates \$24-25,000, **not an insignificant amount**. Many of these improvements or purchases were not essential at this time, but ,for example, all the appliances were 17 years old, and it was time to replace them. Again, NO, it's not 20% of market value of the property, but still necessary improvements. Much of the market value of the property lies in the location, location, location - not necessarily the value of the hard assets and construction."

It would be appreciated if the above paragraph be presented as stated along with all the other documentation.

Please let me know, or please keep me informed of how the process works from here?

Thanks You,

Matt Davies
207-749-8214

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