# RENT BOARD

**April 22, 2026**
**5:00 PM**

**ZOOM INFORMATION:**

**Join from PC, Mac, iPad, or Android:**
**https://portlandmaine-gov.zoom.us/j/85205631634?pwd=nsqaWrLj07XiaOf7K2AwaXRIP9L7u1.1**
**Passcode:068783**

**Phone one-tap:**
**+13092053325,,85205631634#,,,,*068783# US**
**+13126266799,,85205631634#,,,,*068783# 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**
**+1 689 278 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**
**+1 669 900 6833 US (San Jose)**
**Webinar ID: 852 0563 1634**
**Passcode: 068783**
**International numbers available: https://portlandmaine-gov.zoom.us/u/kcty8TKeSX**

## II. ROLL CALL:

## III. APPROVAL OF MINUTES

a. March 25, 2026 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. Written Public Comment

b. Rent Control Report Q1-2026

c. Communications from City Staff

d. Schedule Tenant Rights Appeal

## V. UNFINISHED BUSINESS:

a. Rent Increase Application - Public Comment
Owner: Justin Theberge, 14 Dry Pond Rd, Gray, ME 04039
Address: 8 Massachusetts Ave, all 3 units
CBL: 186-D-024-001

b. Rent Increase Application - Public Comment
Owner: Anna Kuperman and Marina Kuperman-Beade, 17 Twelfth St, Providence, RI 02906
Address: 305 Deering Ave, both units
CBL: 117-C-001-001

## VI. New Business

a. Rent Increase Application - Completeness Review
Owner: Wilbur Cheever, 38 William St, Portland, ME 04103
Address: 72 William St, all 3 units
CBL: 117-C-019-001

b. Rent Increase Application - Completeness Review
Owner: Wilbur Cheever, 38 William St, Portland, ME 04103
Address: 76 William St, all 3 units
CBL: 117-C-017-001

c. Election of Chair & Vice Chair

d. Approval of Findings of Fact & Conclusions of Law

**VII. Adjourn**

**Remote Rent Board Meeting Minutes - Held Via Zoom**

Wednesday, March 25, 2026

**II. Roll Call** - 0:01:02

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

Staff present:
Dylan Orr, Rental Registration Coordinator
Benjamin Plante, Esq., Counsel for the Rent Board

**III. Approval of Minutes** - 0:01:52

a. **February 25, 2026 Minutes** - 0:01:53

0:02:11 - Anne-Laure Razat moves to approve February 25, 2026 minutes. There is no second.

0:05:02 - Rebecca Bolduc moves to approve February 25, 2026 minutes with stated changes. Seconded by Anne-Laure Razat. (5-0) The motion passes.

**IV. Communications** - 0:05:50

a. **Court Decisions for 655 Congress St & 59 State St Appeals** - 0:06:25

0:06:50 - Counsel and City staff explain the court decisions regarding 655 Congress St and 59 State St.

**V. Unfinished Business** - 0:09:10

a. **Approval of Findings of Fact & Conclusions of Law** - 0:09:12

0:11:10 - Matthew Lax moves to approve the Findings of Fact & Conclusions of Law for 193 York Street. Seconded by Kristen Carreras. (5-0) The motion passes.

b. **Rent Increase Application - Public Comment** - 0:12:15
**Owner: Justin Theberge, 14 Dry Pond Rd, Gray, ME 04039**
**Address: 8 Massachusetts Ave, all 3 units**
**CBL: 186-D-024-001**

0:16:20 - The applicant presents the application.

0:24:42 - Objectors speak.

0:27:15 - No public comment received.

0:54:55 - Christopher "Buddy" Moore moves to close the public record. Seconded by Kristen Carreras. (5-0) The motion passes.

0:59:42 - Kristen Carreras moves to table the application for 8 Massachusetts Ave, all three units, to the next meeting or until Notice of Violation is resolved. Seconded by Anne-Laure Razat. (5-0) The motion passes.

c. **Rent Increase Application - Completeness Review** - 1:04:20
**Owner: Theresa Chan, 196 Danforth St, Portland, ME 04102**
**Address: 210 High St, all 6 units**
**CBL: 036-F-013-001**

1:09:08 - Matthew Lax moves to find application for 210 High Street, all 6 units, incomplete. Seconded by Rebecca Bolduc. (5-0) The motion passes.

**VI. New Business** - 1:10:37

a. **Rent Increase Application - Completeness Review -** 1:10:37
**Owner: Amanda Giroux, 9 Lucina Terrace, Gorham, ME 04038**
**Address: 90 Rockland Ave**
**CBL: 185-J-001-001**

1:11:04 - Anne-Laure Razat moves to table 90 Rockland Ave application to the next regular meeting. Seconded by Matthew Lax. (5-0) The motion passes.

b. **Rent Increase Application - Completeness Review** - 1:12:25
**Owner: Anna Kuperman and Marina Kuperman-Beade, 17 Twelfth St, Providence, RI 02906**
**Address: 305 Deering Ave, both units**
**CBL: 117-C-001-001**

1:31:06 - Kirsten Carreras moves to find the application for 305 Deering Ave, both units, complete pending additional item requests. Seconded by Rebecca Bolduc. (5-0) The motion passes.

**VII. Adjourn -** 1:34:13

1:34:13 - Kristen Carreras moves to adjourn. Seconded by Matthew Lax. (5-0). The motion passes.

Dear Members of the Portland Rental Housing Board,

I am writing to submit a public comment regarding two pending petitions before the board, each of which raises concerns not only about the individual cases at hand, but about how the current petition process treats the legitimate costs of being a small landlord in Portland.

**Part I: Justin's Capital Improvement Petition**

Many small landlords in Portland - Justin among them - have for years exercised significant restraint in setting rents, often keeping rates below what the market would bear not out of financial necessity, but out of respect for their tenants and a commitment to long-term relationships. That kind of voluntary moderation is exactly the behavior the city's rental housing goals should be encouraging.

But when a landlord makes a meaningful capital investment - one that directly benefits a tenant or improves the habitability of a unit - and is then required to spend months navigating a board approval process simply to recover what market forces would already recognize as justified, the message sent is a destructive one. The cost of that investment does not wait for board approval. Loan payments, increased property taxes, rising insurance premiums, and regulatory compliance costs accrue regardless. Subjecting straightforward cost-recovery to a prolonged, uncertain review process is not a neutral act - it is a disincentive.

The consequences of that disincentive are predictable and already visible across Portland's rental stock. Landlords who cannot reliably recover the cost of improvements will stop making them. That means aging insulation, inefficient heating systems, deferred maintenance, and lower-quality living conditions for renters - the very people this board exists to protect. The choice facing many small landlords is not between charging more or staying the same. It is between investing in their properties or not investing at all.

There is a further consequence worth naming directly. When holding a tenanted rental property becomes financially untenable, landlords do not simply absorb the loss indefinitely. They exit. That exit most commonly takes one of two forms: sale to a developer - often resulting in condo conversion and permanent removal of rental units from the market - or a shift toward Section 8 and other subsidized tenancies, where landlords can access fair market rents that the petition process might otherwise deny them. Neither outcome serves Portland's renters or its housing supply.

Justin's petition is not an attempt to exploit a potentially new tenant. It is an attempt to do what the market, basic accounting, and common sense already recognize as reasonable: recover the cost of a real investment that made a unit better. The board should approve it and should take seriously the broader question of whether the current capital improvement passthrough process is achieving its intended goals - or inadvertently making Portland's rental housing worse.

**Part II: Anna Kuperman's Self-Management Expense**

It is worth noting at the outset that Anna Kuperman would not be here justifying the value of her own labor if the board's petition process did not require her to. Under normal market conditions, she could simply raise rent within a range that would be compensatory to current market conditions for her unit. The fact that this process requires her to itemize and defend her operating costs is a function of the system - and the board should be careful not to use that requirement as a trap, demanding cost documentation on one hand while applying an impossible standard of proof on the other.

On the substance: the skepticism applied to Anna's $5,000 annual management expense rests on a logical inconsistency. There is no such thing as free work. Any time an owner spends managing their property, whether significant or minimal, carries real opportunity cost. The fact that no check changed hands does not change that calculus.

The board appears willing to accept a 10% property management fee as a legitimate operating expense when it is paid to a third party. That figure is treated as self-evidently reasonable - no audit of the management company's actual work product is required. If that payment is an acceptable proxy for the value of property management, then the same rate retained by an owner performing the same function is an equally valid proxy. The work either has that value, or it doesn't. Who receives the payment cannot be the determining factor.

It is also worth asking whether the board audits the work performed by property management companies before accepting their fees. A property that runs smoothly with no tenant complaints could reflect very little effort from an outside manager, while at the same time costing a landlord the same amount of money. The absence of tenant complaints is not evidence of inactivity - it is evidence that the work is being done. By that measure, an owner whose property runs without issue has demonstrated exactly what should be required.

Asking Anna to document her management activities does not resolve this problem, because documentation of tasks performed cannot satisfy a standard that is implicitly about whether a check was written to an outside party. No log of hours or activities can bridge that gap. The evidentiary burden being imposed is arbitrary: the board's own framework has no mechanism to convert her records into an accepted dollar value regardless of what they show.

The consistent and fair approach is straightforward: if the board accepts 10% of rent as a reasonable property management expense when paid to a company, it should accept the same figure when retained by the owner. Anna's petition should be approved.

Thank you for your time and consideration.

Respectfully submitted,

Michael Beal
92 Pleasant Street Unit 2, Portland, Maine

City of Portland | Permitting and Inspections
Jessica Quattropani, *Director*

**TO:** Housing & Economic Development Committee
**CC:** Rent Board
**FROM:** Jessica B. Quattropani, Director of Permitting and Inspections
**DATE:** April 7, 2026
**RE:** Quarterly Rent Control Report- Q1-2026

# Rent Control Report
# Quarter 1 (1/1/2026-3/31/2026)

**2026 Licensed Long-Term Rentals:**

| | Registered | Partially Registered | Unregistered |
|---|---|---|---|
| **As of 3/31/2026** | 19,579 | 146 | 189 |

**Rent Board**

| | Total # of Applications | Total # of Applications approved | Total # of Applications Denied | Total # of Applications Tabled |
|---|---|---|---|---|
| Rent Increases | 7 | 3 | 0 | 4 |
| Complaints | 3 | 1 | 2 | 0 |
| Other | 0 | 0 | 0 | 0 |
| **Quarter 1 Total:** | **10** | **4** | **2** | **4** |
| ***Year to date Total*** | ***10*** | ***4*** | ***2*** | ***4*** |

**Rent Control Inspections**

| Type of Inspections | Total # Properties | Total # of units |
|---|---|---|
| **Complaints** (Potential violations reported to our office) | *12 | 189 |
| **Audits** (Proactive enforcement based on percentage that rent was increased) | 171 | 2,203 |
| **Quality Control** (proactive verification of data supplied to our office) | 158 | 2,699 |
| **License Reviews** (review rental information in new license applications) | 161 | 356 |
| **Quarter 1 Total:** | **502** | **5,447** |
| ***Year to date Total*** | ***502*** | ***5,447*** |

***Breakdown of Complaints by property:**

| | Founded Complaints *violation exists | Unfounded Complaints #no violation | In Progress *actively investigating |
|---|---|---|---|
| **Quarter 1 Total** | 8 | 2 | 2 |
| ***Year to Date Total*** | 8 | 2 | 2 |

**#Unfounded Complaint Breakdown:**

1. Dispute over return of security deposit - referred tenant to Pine Tree Legal. Property maintenance complaint - referred to Housing Safety.
2. Dispute over plumbing services rendered - referred tenant to Pine Tree Legal.

**Rent History Report Requests:**

| | Total # of Requests |
|---|---|
| **Quarter 1 Total** | 65 |
| ***Year to Date Total*** | *65* |

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: 655 Congress St & 59 State St - Appeal to Law Court**

The final decisions executed by the Rent Board for the tenant complaints submitted by the Trelawny Tenants Union regarding the properties at 655 Congress St and 59 State St have been appealed to the Law Court pursuant to Maine Rules of Appellate Procedure by the property owner (Trelawny 657 LLC and 59 State Street LLC respectively).

Thank you,

Dylan Orr
Rental Registration Coordinator
City of Portland
Business Licensing & Housing Safety Office

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: 33 State St - 80B Appeal**

The final decision executed by the Rent Board for the tenant complaints submitted by the Trelawny Tenants Union regarding the property at 33 State St has been appealed to Superior Court pursuant to 80B of the Maine Rules of Civil Procedure by the property owner, Atanas Dinkov.

Thank you,

Dylan Orr
City of Portland
Business Licensing & Housing Safety Office

Dylan Orr <dorr@portlandmaine.gov>

## Portland Rent Board Complaint

**Sean McGuire** <sean.mcguire@maine.edu> Mon, Apr 20, 2026 at 9:40 AM
To: rentboard@portlandmaine.gov
Cc: livchase@yahoo.com, Brent Adler <brentadler@gmail.com>, Zoë Kennedy <zkennedy@gmail.com>, Hans Goudey <mail@hansgoudey.com>

# Portland Rent Board,

I am emailing you to file a complaint for what may be retaliation by my landlord: Snowy Owl LLC (Brent Adler and Liv Chase). Our tenancy is 11 Smith Street Apt 3 Portland.

There currently is another complaint just filed with Rent Control on the property being improperly listed as owner occupied previously. Mercedes Bohaty is the inspector for that audit (RCC2600698).

I have also spoken with Dare Guild on this matter, and have been encouraged by Dare, Mercedes, and my attorney to file another complaint for retaliation after first attempting a rent increase outside the amount possible by rent control.

The believed retaliation and all communication is in writing. Rents have always been paid, lease followed, and no notice of violations have been given by landlord. We have been given 90 day notice from landlord. Landlord has been given multiple opportunities to respond to what we believe is retaliation, or come to a common ground but there seems to be no response.

Please let me know how to proceed. I can upload all documents, leases, and communication similar to the other complaint.

Much thanks,
Sean McGuire

# City of Portland – Housing Safety Division

## LANDLORD APPLICATION FOR RENT INCREASE SUMMARY

**Date of Hearing**

January 28, 2026 - Tabled to February 25, 2026 - Tabled to March 25, 2026 - Tabled to April 22, 2026

**Owner Name and Address**

Justin Theberge

14 Dry Pond Rd

Gray, ME 04039

**Agent Name and Address**

N/A

**Property Address**

8 Massachusetts Ave, all 3 units

**CBL**

186-D-024-001

**Tenants/Interested Parties**

Yes

**City of Portland | Permitting and Inspections**
Licensing and Housing Safety Division
Rentboard@portlandmaine.gov | 207-874-8900

**March 16, 2026**

Re: Notice of Public Hearing

To: Tenants of 8 Massachusetts Ave

This is a notice of a public hearing before the Rent Board at their next scheduled meeting on **Wednesday, March 25, 2026** at 5pm. This meeting will be held via Zoom.

The property owner for the above address, **Justin Theberge**, has submitted a "Landlord Worksheet/Petition for Rent Board Approved Rent Increase".

The Zoom link will be accessible by **March 18, 2026** 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)].
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: 8 Massachusetts Ave

Parcel Numbers(s): 186-D-024-001

Year Property Purchased by Current Owner: 2015

Total Number of Units on the Property: 3

Total Number of Units Affected by Proposed Rent Increase: 3

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: Justin Theberge

Phone(s): 207-740-5653

Business Address: 14 Dry Pond Rd

City, State, Zip: Gray, ME, 04039

Business E-mail: justin.theberge5@gmail.com

## 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: | ☐ | ☐ | ☐ |

## 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.

Landlord provides lawn care, snow removal, sanding and landscaping for no additional charge to the tenants as well as all maintenance within each unit.

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

No, change to the above services since the base year.

## 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. | $ 46,200 | $ 52,320 |
| 2. Portion Attributable to Vacancy | $ 0 | $ 0 |
| **Fees (indicate what fee is for):** | | |
| 3. Late fees | $ 0 | $ 0 |
| 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 | $ 0 |
| 12. Electricity | $ 0 | $ 0 |
| 13. Water | $ 0 | $ 0 |
| 14. Sewer | $ 0 | $ 0 |
| 15. Garbage & Recycling | $ 0 | $ 0 |
| **Other Utilities (list separately by type):** | | |
| 16. _____ | $ | $ |
| 17. _____ | $ | $ |
| **18. TOTAL INCOME** (add only lines 1 and 3-17) | **$** 46,200 | **$** 52,320 |

[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 | $ | $ |
| 2. Real Property Taxes | $ 7,012.74 | $ 8,967.22 |
| 3. License Tax/Fee | $ 0 | $ 186 |
| 4. Rent Board Registration Fees | $ 0 | $ 142.50 |
| 5. Insurance | $ 1,419 | $ 2,371 |
| 6. Accounting | $ | $ |
| 7. Legal (explain types of legal expenses) | $ | $ |
| 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 | $ 550 | $ 600 |
| 17. Other Maintenance | $ | $ |
| 18. Parking Lot/Street Maintenance | $ | $ |
| 19. Gas (separately metered only) | $ | $ |
| 20. Electricity (separately metered only) | $ | $ |
| 21. Water | $ 1,424.47 | $ 1,869.59 |
| 22. Sewer | $ | $ |
| 23.Amortized portion of Capital Expense (see Sections X, XI and XII column (i)) | $ | $ 3,954.85 |
| 24. Vandalism Repairs | $ | $ |
| 25. Uninsured Damages | $ | $ |
| **27. TOTAL OPERATING EXPENSES** | **$** 10,406.21 | **$** 18,091.16 |

## 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<br>(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) 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 Base Year [add amounts in column (d)]: $ 0

Annual Cost for Base Year [add amounts in column (i)]: $ 0

## 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) 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 |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Roof | 3 | $ 16,000 | 8.5% | 10 | $ $7,805.25 | $ $23,805.25 | $ $2,380.53 | $ $198.38 | $ $66.13 |
| 2 | Cabinets/Countertops | 1 | $ 5,286 | 8.5% | 10 | $ $2,578.66 | $ $7,864.66 | $ $786.47 | $ $65.54 | $ $65.54 |
| 3 | Back Porch Doors | 3 | $ $5,295.27 | 8.5% | 10 | $ $2,583.18 | $ $7,878.45 | $ $787.85 | $ $65.65 | $ $21.88 |
| | | | $ | % | | $ | $ | $ | $ | $ |
| | | | $ | % | | $ | $ | $ | $ | $ |
| | | | $ | % | | $ | $ | $ | $ | $ |

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

Total for Current Year [add amounts in column (d)]: $ 26,581.27

Annual Cost for Current Year [add amounts in column (i)]: $ 3,954.85

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

Good Afternoon,

As you can see from Sheet 18 Section XV there is a deficit of Fair  Net Annual Operating Income of $8,605.59 annually or $239.04 monthly per unit. This is driven by a couple of reasons: A) Units 1 and 3 did not have any rent increases between 2015 and 2019 which means the 2019 Base did not factor any CPI. B) Capital improvements over the last couple of years that are being amortized but have not been factored into Rents.

Below is my Ask/Proposal. I have a strong relationship with my tenants and run a good quiet building. I try very hard to keep communication open and not disturb long term tenants.

Unit 1

These tenants have been in this unit for over 30 years. There rent was $1,050 in 2015 as well as in 2019 and only started increasing when rent control went into effect. Today they are at $1,400 as of April 2025 which is the Fair Market Rent for Portland, ME from 2019 according to the chart in this application. I plan to leave them at $1,400 for the foresee future but I am requesting $338.64 monthly in Banked Rent ($239.04 current year deficit + 99.60 (please refer to Excel Sheet labeled "Investments 2025 Completed" cell N11)) This way I have the ability over the next couple years to recover my capital investment.

Unit 2

This tenant has lived in the building since 2021. Their initial rent was $1,700 and they received their 1st rent increase ever in April 2025 bringing them up to $1,800. Currently there is $190.43 monthly in Banked Rent. Similar to Unit 1 I am not looking to increase the rent for this unit in the foreseeable future but I am requesting additional banked rent for the capital Investments already made. Today's Banked Rent is $190.43 + 239.04 for Current Year Capital Improvements + 99.60 for FY25 Capital Improvements the new Banked Rent would be $529.07 monthly.

Unit 3

This unit was at $1,100 in 2015 as well as in 2019 and only started seeing rent increases in 2021, so no CPI was factored into the Base Year. Tenant passed away in Feb 2025 and rent was $1,360, which is under the Fair Market Rent for Portland, ME from 2019. Unit was renovated in 2025 and I am seeking an adjusted rent of $2,200 for this unit. This was determined by (1,360 + 239.04 current year deficit (sheet 18) +  610.52 FY25 completed renovation amortization (please refer to Excel Investments 2025 Completed cell N13) = 2,200 )

I think this is a very fair proposal, as it allows me the landlord to receive a fair rate of return based on the forms/calculations provided to me. It also does not impact Units 1 and 2 currently as those are longer term tenants. For unit 3 it allows a fair market return for an updated unit and had no impact on existing tenants.

## 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 does not materially vary between years |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

### Owner Performed Labor – Current Year

| Date | Hours | Hourly Rate | Units Impacted | Type of Work |
|---|---|---|---|---|
| | | | | Owner Performed Labor does not materially vary between years |
| | | | | |
| | | | | |
| | | | | |

## 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) Item # | (b) Brief Description and Expected Date of Completion | (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 |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | New Windows<br>April 2025 | 1 | $ 7,236 | 8.5% | 5 | $ 1,671.46 | $ 8,907.46 | $ 1,781.49 | $ 148.46 | $ 148.46 |
| 2 | New Sewer Line<br>Jan 2025 | 3 | $ 6,499.06 | 8.5% | 10 | $ 3,170.43 | $ 9,669.49 | $ 966.95 | $ 80.58 | $ 26.86 |
| 3 | New Furance<br>Sept 2025 | 3 | $ 17,600 | 8.5% | 10 | $ 8,585.78 | $ 26,185.78 | $ 2,618.58 | $ 218.21 | $ 72.74 |
| 4 | Cabinets/Bathroom/Flooring<br>Aug 2025 | 1 | $ 16,590.66 | 8.5% | 10 | $ 8,093.39 | $ 24,684.05 | $ 2,468.41 | $ 205.70 | $ 205.70 |
| 5 | ~~Appliances/ Painting/ Fans~~<br>Aug 2025 | 1 | $ 7,640.97 | 8.5% | 5 | $ 1,765 | $ 9,405.97 | $ 1,881.19 | $ 156.77 | $ 156.77 |

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

Proposed Capital Expenses [add amounts in column (d)]: $ 55,566.69

Annual Cost for Proposed Capital Expenses [add amounts in column (i)]: $ 9,716.62

## XV. Net Operating Income (NOI)

Net Operating Income = Income – Operating Expenses

| | Base Year (2019) | Current Year (2024) |
|---|---|---|
| 1. Total Annual Income | $ 46,200 | $ 52,320 |
| 2. Annual Operating Expenses | $ 10,406.21 | $ 18,091.16 |
| 3. Net Annual Operating Income | $ 35,793.79 | $ 34,228.84 |
| 4. CPI [Annual Average CPI] | 281.082 | 336.376 |

5. Percent Annual Increase in CPI Base Year to Current Year

$$\frac{\text{Line 4 Current Year-Line 4 Base Year}}{\text{Line 4 Base Year}} \times 100$$

19.67 %

6. Fair Net Annual Operating Income = Base Year Net Operating Income Adjusted by CPI Increase

$$\frac{\text{Line 5} + 100}{100} \times \text{Line 3 Base Year}$$

$ 42,834.43

7. Fair Net Annual Operating Income Minus Current Net Operating Income = Allowable Rent Increase

$$\text{Line 6} - \text{Line 3 Current Year}$$

$ 8,605.59

8. Allowable Rent Increase/Unit/Month[3]

$$\text{Line 7} \div 12 \div \text{\# of Units}$$

$ 239.04

[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 | $1,400 | $100 | April 2025 | 7.1 % | % | $ | Increased from 1,300 to 1,400 |
| 2 | $1,800 | $100 | April 2025 | 5.5 % | % | $ | 1st Rent increase since 2021. $190.43 remaining in Banked Rent |
| 3 | $1,360 | $ | | % | % | $ | Tenant passed away in Feb 2025 - Unit underwent Renovation |
| | $ | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |

## 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: Please refer to XII for Analysis of the below

| 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 | $ 1,050 | Unknown | $ 1,050 | 04/01/2025 | $ 0 | $ 1,400 | $ 1,400 |
| 2 | $ 1,700 | 07/01/2021 | $ 1,700 | 04/01/2025 | $ 0 | $ 1,800 | $ 1,800 |
| 3 | $ 1,100 | 08/01/2025 | $ 2,200 | N/A | $ 849.56 | $ 2,200 | $ 2,200 |
| | $ | | $ | | $ | $ | $ |
| | $ | | $ | | $ | $ | $ |
| | $ | | $ | | $ | $ | $ |
| | $ | | $ | | $ | $ | $ |
| | $ | | $ | | $ | $ | $ |
| | $ | | $ | | $ | $ | $ |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |

## 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.
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 (2019) | Current Year (2024) |
|---|---|---|
| **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] | 281.082 | 336.376 |

5. Percent Annual Increase in CPI Base Year to Current Year

$$\frac{\text{Line 4 Current Year-Line 4 Base Year}}{\text{Line 4 Base Year}} \times 100$$

_____ %

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:

Dylan Orr <dorr@portlandmaine.gov>

# Rent Board - Completeness Review Requests

**Theberge, Justin T** <Justin.Theberge@td.com> Fri, Feb 27, 2026 at 2:27 PM
To: Dylan Orr <dorr@portlandmaine.gov>

Good Afternoon Dylan,

Please see attached the requested materials for 8 Massachusetts Ave.

Please reach out with any questions.

| | | |
|---|---|---|
| 02/03/2026 | CASHOUT VENMO PPD | $1,800.00 |
| 02/03/2026 | Deposit: Deposit | $1,236.00 |
| 02/02/2026 | CASHOUT VENMO PPD | $1,351.00 |

Thank you

Justin

**From:** Dylan Orr <dorr@portlandmaine.gov>
**Sent:** Thursday, February 26, 2026 10:39 AM
**To:** Theberge, Justin T <Justin.Theberge@td.com>
**Subject:** Rent Board - Completeness Review Requests

CAUTION: EXTERNAL MAIL. DO NOT CLICK ON LINKS OR OPEN ATTACHMENTS YOU DO NOT TRUST
ATTENTION : COURRIEL EXTERNE. NE CLIQUEZ PAS SUR DES LIENS ET N'OUVREZ PAS DE PIÈCES JOINTES AUXQUELS VOUS NE FAITES PAS CONFIANCE

[Quoted text hidden]

Notice: Under Maine law, documents - including e-mails - in the possession of public officials or city employees about government business may be classified as public records. There are very few exceptions. As a result, please be advised that what is written in an e-mail could be released to the public and/or the media if requested.

Internal

This message and any attachments may contain confidential or privileged information meant only for the use of the intended recipients of this message. If you are not the intended recipient of this message, please notify the sender by return email, and delete this and all copies of this message and any attachments from your system. Any unauthorized disclosure, use, distribution, or reproduction of this message or any attachments is prohibited and may be unlawful.

**3 attachments**

**Rent Adjustment Notice Unit 1 FY25.docx**
29K

**Rent Adjustment Notice Unit 3 FY25.docx**
29K

**Rent Increase Notice Unit 2 FY25.docx**
26K

# Rent Adjustment Notice

8 Massachusetts Ave (Unit 1) 1/27/2026

[redacted]

Dear [redacted],

I hope you are doing well. I am writing to you as a follow up to my call with you to update you on an important matter regarding the property and your rental rate.

Over the past several months, I have been actively working with the City of Portland to address ongoing concerns related to the property. During this process, there are still details that need to be reviewed and resolved, and the final outcome has not yet been determined.

In the meantime, I want to ensure that you are treated fairly while these discussions continue. As a result, **your rent will be temporarily reduced to $1,236 monthly until an agreed-upon resolution is reached with the City.**

Please note that this is a temporary measure meant to support you during the review period and to ensure I remain in compliance. Once the City and I reach a final agreement, I will provide written notice of any updates or changes moving forward.

Thank you for your patience and understanding. As always if you have any questions or concerns feel free to call me directly.

Thank You

Justin Theberge
207-740-5653

# Rent Adjustment Notice

8 Massachusetts Ave (Unit 3) 1/27/2026
[redacted] / [redacted]

Dear [redacted],

I hope you are doing well. I am writing to you as a follow up to my call with you to update you on an important matter regarding the property and your rental rate.

Over the past several months, I have been actively working with the City of Portland to address ongoing concerns related to the property. During this process, there are still details that need to be reviewed and resolved, and the final outcome has not yet been determined.

In the meantime, I want to ensure that you are treated fairly while these discussions continue. As a result, **your rent will remain at $2,200 so it complies with your lease, however I will issue you a monthly rebate of $849 to reduce rent to $1,351 monthly until an agreed-upon resolution is reached with the City.**

Please note that this is a temporary measure meant to support you during the review period and to ensure I remain in compliance. Once the City and I reach a final agreement, I will provide written notice of any updates or changes moving forward.

Thank you for your patience and understanding. As always if you have any questions or concerns feel free to call me directly.

Thank You

Justin Theberge
207-740-5653

# Rent Increase Notice

8 Massachusetts Ave (Unit 2) 1/1/2025

[redacted]

Dear [redacted],

Just wanted to inform you that effective **April 1, 2025**, that the rent for your unit will increase by $100 dollars per month. This rent increase is based on the fact that the City of Portland completed a Tax Reassessment which had a significant impact to the Tax Base as well as the passing of Rent Control which locks me (Justin Theberge Landlord) into certain restrictions.

| | |
|---|---|
| Base Rent | $1,700.00 |
| Banked Rent Used | $100.00 |
| Banked Rent Remaining | $179.93 |
| **New Rent** | **$1,800.00** |

Based on Rent Control, your base rent is increasing based on the Greater Portland CPI for FY24 as well as the portion of Banked Rent that has been accruing because of the Rent Control Ordinance. If you have any questions and want to discuss anything further, please feel free to contact me below.

Thank You

Justin Theberge
207-740-5653

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

11/12/2025
License #: **20164741**
Code Case #: **RCC2500377**
Justin T Theberge /
14 DRY POND RD
GRAY, ME 04039

# NOTICE OF VIOLATION AND ORDER TO CORRECT

To Whom It May Concern,

The City of Portland Permitting and Inspections Department inspected the rental data for **8 MASSACHUSETTS AVE PORTLAND, ME** on **11/12/2025** and found violations of the City of Portland Code of Ordinances, which are listed on the attached page(s). You are hereby ordered to correct these violations by **12/12/2025**. Please be advised that penalties will be applied if the violations are not corrected by that date.

If you do not correct the attached violations by the date given, then this matter will be referred to the City of Portland Corporation Counsel for legal action, and you will be charged $150 for re-inspection per the City's fee schedule. In the event of court action, the City may be entitled to an order to correct the violations, civil penalties in the minimum of $100 per violation per day, costs and fees, and other relief under §1-15 of the City Code and 30-A M.R.S. §4452.

Please respond in writing via email to rentcontrol@portlandmaine.gov or send response by USPS to **389 Congress St, Portland, Maine 04101**.

**You have a right to appeal this decision to Superior Court within 30 days of the date of this notice pursuant to Rule 80B of the Maine Rules of Civil Procedure.**

I appreciate your anticipated cooperation, and please contact our office by calling 207-874-8900 if you have any questions.

Thank you,

Adam O'Connor
Rental Registration Inspector

– – – –

Total Violations: 3

## NON-COMPLIANCE VIOLATION LIST

| | |
|---|---|
| APPLICABLE CODE SECTION (S) | City Code 6-234(c) |
| CODE DESCRIPTION | At no time may a Landlord raise the rent of a Covered Unit by more than ten (10) percent. Any rent increases available to a Landlord in excess of ten (10) percent must be banked for later use. |
| COMMENTS | The owner has claimed a rent increase that exceeds 10% of the previous reported rent.<br><br>Unit #3 rent increased on 7/1/2025 from $1,370.67 to $2,200, resulting in a 60.5% increase. |
| DEADLINE | 12/12/2025 |

| | |
|---|---|
| APPLICABLE CODE SECTION (S) | City Code 6-235.1 |
| CODE DESCRIPTION | At no time shall any Landlord charge Rent on a Covered Unit that exceeds the Base Rent plus any accrued increases allowed under this Ordinance, and any Landlord who charges Rent on a Covered Unit that is greater than such amount is in violation of this Ordinance. This section shall not be construed to retroactively revoke any allowable increases accrued under previous versions of this Ordinance. |
| COMMENTS | Unit #1 rent increased on 1/1/2023, from $1,100.00 to $1,200, resulting in a 9.0% increase. The Allowable Increase Percentage for the year 2023 was 7.0%. The increase for Unit #1 applied a $50 "Pet Fee" to the rent increase per the Rent Increase Notice dated 9/23/2022. The four (4) allowable increases per Sec 6-234(b) of the City Code are the Allowable Increase Percentage, New Tenancy, Banked Rent, and Additional Rent Board Approved Increases. "Pet Fee" is not an allowable increase per the City Code.<br><br>Unit #3 rent increased on 1/1/2023, from $1,158.42 to $1,250.0,4, resulting in a 7.9% increase. The Allowable Increase Percentage for the year 2023 was 7.0%. No Banked Rent was claimed in either the 9/5/2021 or 9/16/2022 Rent Increase Notices provided to the City. |
| DEADLINE | 12/12/2025 |

| | |
|---|---|
| APPLICABLE CODE SECTION (S) | Remedy - City Code Sec 6-234(f) |

Justin T Theberge /
14 DRY POND RD
GRAY, ME 04039

| | |
|---|---|
| CODE DESCRIPTION | A landlord who is not in substantial compliance with any provision of this chapter, including but not limited to the Rent Stabilization Ordinance, may not demand, accept or retain any rent increase otherwise permitted by this section or any other provision of this Code or Maine statute. |
| COMMENTS | Unit #1:<br>The owner is ordered to reduce the rent to the last code-compliant amount of $1,100 and reimburse the tenant(s) any overcharge.<br><br>Unit #3:<br>The owner is ordered to reduce the rent to the last code-compliant amount of $1,158.45 and reimburse the tenant(s) any overcharge.<br><br>Proof of resolution must be sent in writing. Resolution documents can be sent via USPS to 389 Congress Street, Room 302, Portland, ME 04101 or electronically via to rentcontrol@portlandmaine.gov |
| DEADLINE | 12/12/2025 |

Justin T Theberge /
14 DRY POND RD
GRAY, ME 04039

# City of Portland — Housing Safety Division

## RENT INCREASE APPLICATION – MAINTENANCE OF NET OPERATING INCOME

**Date of Hearing:**

March 25, 2026 - Tabled to April 22, 2026

**Owner Name and Address:**

Anna Kuperman & Marina Kuperman-Beade
17 Twelfth St, Providence, RI 02906

**Property Address:**

305 Deering Ave, both units

**CBL:**

117-C-001-001

**Tenants/Interested Parties:**

Yes

**City of Portland | Permitting and Inspections**
Licensing and Housing Safety Division
Rentboard@portlandmaine.gov | 207-874-8900

**April 15, 2026**

Re: Notice of Public Hearing

To: Tenants of 305 Deering Ave

This is a notice of a public hearing before the Rent Board at their next scheduled meeting on **Wednesday, April 22, 2026** at 5pm. This meeting will be held via Zoom.

The property owner for the above address, **Anna Kuperman & Marina Kuperman-Beade**, has submitted a "Landlord Worksheet/Petition for Rent Board Approved Rent Increase".

The Zoom link will be accessible by **April 15, 2026** 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

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# 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)].
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.

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General Information About the Property

Street Address: 305 Deering Ave.

Parcel Numbers(s): PTLDM117BC001001

Year Property Purchased by Current Owner: 2021(inherited)

Total Number of Units on the Property: 2

Total Number of Units Affected by Proposed Rent Increase: 2

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: Anna Kuperman and Marina Kuperman-Beade

Phone(s): 401-523-7606

Business Address: 17 Twelfth St.

City, State, Zip: Providence, RI 02906

Business E-mail: annakuperman@gmail.com

## 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 | ☑ | ☐ | ☐ |
| Stormwater | ☑ | ☐ | ☐ |
| Garbage | ☐ | ☐ | ☐ |
| Other: | ☐ | ☐ | ☐ |

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## 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.

Landlord paid for lawn care, snow removal, water bill, stormwater bill. All services provided without charge in 2023 and 2024. Bills attached.

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 (2023)[1] | Current Year (2024) |
|---|---|---|
| **Rental Income** | | |
| 1. Gross scheduled rental income (total for the calendar year) including uncollected rent. | $ 51,136.08 | $ 51,734.57 |
| 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) | $ 51,136.08 | $ 51,734.57 |

[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.

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## VIII. Operating Expense Worksheet

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

| | Base Year (2023) | Current Year (2024) |
|---|---|---|
| 1. Assessments | $ | $ |
| 2. Real Property Taxes | 9820.95 | 10,845.84 |
| 3. License Tax/Fee | | |
| 4. Rent Board Registration Fees | 101 | 101 |
| 5. Insurance | 2695 | 2939 |
| 6. Accounting | | 2681 |
| 7. Legal (explain types of legal expenses) | | |
| 8. Manager /Management Services | 1400 | 5000 |
| 9. Security | | |
| 10. Office Supplies | | |
| 12. Normal Repairs | 2081 | 2039 |
| 13. Owner-Performed Labor | | 1470 |
| 14. Plumbing Maintenance | 805 | |
| 15. Pool Maintenance | | |
| 16. Landscape Maintenance/snow removal | 1475 | 1820 |
| 17. Other Maintenance | 650 | 998 |
| 18. Parking Lot/Street Maintenance | | |
| 19. Gas (separately metered only) | | |
| 20. Electricity (separately metered only) | | |
| 21. Water | 1523.44 | 2021.06 |
| 22. Stormwater | 274.50 | 279 |
| 23. Amortized portion of Capital Expense (see Sections X, XI and XII column (i)) | 10,377 | 5895 |
| 24. Vandalism Repairs | | |
| 25. Uninsured Damages | | |
| **27. TOTAL OPERATING EXPENSES** | 30,988 | 36,088.90 |

## 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 |

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## 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 |
| | |

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 | |

11

| | 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 |

12

| | 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.

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## 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) 2023 includes 2020, 2021, 2022 2023

| (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 |
|---|---|---|---|---|---|---|---|---|---|---|
| ___ | 2023 | _____ | $_____ | _____% | _____ | $_____ | $_____ | $_____ | $_____ | $_____ |
| ___ | see worksheet 13A | _____ | $_____ | _____% | _____ | $_____ | $_____ | $_____ | $_____ | $_____ |
| ___ | receipts attached in supporting docs | _____ | $_____ | _____% | _____ | $_____ | $_____ | $_____ | $_____ | $_____ |
| ___ | pages 81-106 | _____ | $_____ | _____% | _____ | $_____ | $_____ | $_____ | $_____ | $_____ |
| ___ | labeled 13A, 1-25 | _____ | $_____ | _____% | _____ | $_____ | $_____ | $_____ | $_____ | $_____ |
| ___ | _____ | _____ | $_____ | _____% | _____ | $_____ | $_____ | $_____ | $_____ | $_____ |

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

Total for Base Year [add amounts in column (d)]: $ 57,916

Annual Cost for Base Year [add amounts in column (i)]: $ 10,377

worksheet 13A

| (a) Item # | (b) Description of Expense | (c) # of Units Impacted By Expense | (d) Initial Cost | (e) Interest Rate Allowed* | (f) Amortization Period (years)* | (g) Interest Cost | (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. Fill in columns (a) through (f) and then columns (g)

Total for Base Year: $ -

[add amounts in column (d)]

Completed Capital Improvement and Expense Worksheet (Current Year)

| Year | (a) Item # | (b) Description of Expense | (c) # of Units Impacted By Expense | (d) Initial Cost | (e) Interest Rate Allowed* | (f) Amortization Period (years)* | (g) Interest Cost | (h) Total Cost [Principal + Interest] | (i) Annual Cost | (j) Monthly Cost | (k) Monthly Cost Per Unit |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 2021 | 1 | Boiler replacement | 1 | $ 8,652.00 | 8.77% | 10 | $ 4,371.10 | $ 13,023.10 | $ 1,302.31 | $ 108.53 | $ 108.53 |
| | 2 | House trap replace | 2 | $ 7,916.00 | 8.77% | 10 | $ 3,999.26 | $ 11,915.26 | $ 1,191.53 | $ 99.29 | $ 49.65 |
| 2022 | 3 | Roof replacement | 2 | $ 11,400.00 | 8.77% | 10 | $ 5,759.42 | $ 17,159.42 | $ 1,715.94 | $ 143.00 | $ 71.50 |
| | 4 | Tub/shower replace | 1 | $ 9,836.00 | 8.77% | 10 | $ 4,969.27 | $ 14,805.27 | $ 1,480.53 | $ 123.38 | $ 123.38 |
| | 5 | Cooktop replace | 1 | $ 2,899.00 | 8.77% | 5 | $ 692.32 | $ 3,591.32 | $ 718.26 | $ 59.86 | $ 59.86 |
| | 6 | Interior lighting repla | 1 | $ 913.00 | 8.77% | 10 | $ 461.26 | $ 1,374.26 | $ 137.43 | $ 11.45 | $ 11.45 |
| | 7 | Masonry repair | 2 | $ 932.00 | 8.77% | 10 | $ 470.86 | $ 1,402.86 | $ 140.29 | $ 11.69 | $ 5.85 |
| | 8 | Kitchen vent hood | 1 | $ 661.00 | 8.77% | 5 | $ 157.86 | $ 818.86 | $ 163.77 | $ 13.65 | $ 13.65 |
| | 9 | Storm door replace | 2 | $ 762.00 | 8.77% | 5 | $ 181.98 | $ 943.98 | $ 188.80 | $ 15.73 | $ 7.87 |
| | 10 | Plb fix + lighting fixt replace | 1 | $ 666.00 | 8.77% | 10 | $ 336.47 | $ 1,002.47 | $ 100.25 | $ 8.35 | $ 8.35 |
| 2023 | 11 | Water heater replacement | 2 | $ 9,000.00 | 8.77% | 5 | $ 2,149.33 | $ 11,149.33 | $ 2,229.87 | $ 185.82 | $ 92.91 |
| | 12 | Bath fan + DW replace | 1 | $ 2,844.00 | 8.77% | 5 | $ 679.19 | $ 3,523.19 | $ 704.64 | $ 58.72 | $ 58.72 |
| | 13 | Dehumidifiers | 1 | $900 | 8.77% | 5 | $ 214.93 | $ 1,114.93 | $ 222.99 | $ 18.58 | $ 18.58 |
| | 14 | Smoke Alarms | 1 | $535 | 8.77% | 10 | $ 270.29 | $ 805.29 | $ 80.53 | $ 6.71 | $ 6.71 |

13A

*Use the amortization table in this Attachment and the information about interest rates. Fill in columns (a) through (f) and then columns (g) through (k) will fill in automatically.

Total for ~~Base Year~~: Current $ 57,916

[add amounts in column (d)]

Total annual cost (sum of (i)): $ 10,377

WSN

Completed Capital Improvement and Expense Worksheet (Current Year) 2024

**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 |
|---|---|---|---|---|---|---|---|---|---|---|
| ___ | see 2024 | ____ | $ ____ | ____% | ____ | $ ____ | $ ____ | $ ____ | $ ____ | $ ____ |
| ___ | worksheet attached | ____ | $ ____ | ____% | ____ | $ ____ | $ ____ | $ ____ | $ ____ | $ ____ |
| ___ | receipts in supporting docs | ____ | $ ____ | ____% | ____ | $ ____ | $ ____ | $ ____ | $ ____ | $ ____ |
| ___ | 109-115 | ____ | $ ____ | ____% | ____ | $ ____ | $ ____ | $ ____ | $ ____ | $ ____ |
| ___ | ____ | ____ | $ ____ | ____% | ____ | $ ____ | $ ____ | $ ____ | $ ____ | $ ____ |
| ___ | ____ | ____ | $ ____ | ____% | ____ | $ ____ | $ ____ | $ ____ | $ ____ | $ ____ |

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

Total for Current Year [add amounts in column (d)]: $ 38,299

Annual Cost for Current Year [add amounts in column (i)]: $ 5895

| (a) Item # | (b) Description of Expense | (c) # of Units Impacted By Expense | (d) Initial Cost | (e) Interest Rate Allowed* | (f) Amortization Period (years)* | (g) Interest Cost | (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. Fill in columns (a) through (f) and then columns (g)

Total for Base Year: $ -

[add amounts in column (d)]

Completed Capital Improvement and Expense Worksheet (Current Year)

| Year | (a) Item # | (b) Description of Expense | (c) # of Units Impacted By Expense | (d) Initial Cost | (e) Interest Rate Allowed* | (f) Amortization Period (years)* | (g) Interest Cost | (h) Total Cost [Principal + Interest] | (i) Annual Cost | (j) Monthly Cost | (k) Monthly Cost Per Unit |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 2024 | 1 | Elec + plbg fixt replace | 1 | $ 3,083.00 | 8.22% | 10 | $ 1,448.76 | $ 4,531.76 | $ 453.18 | $ 37.76 | $ 37.76 |
| | 2 | Storm door+lockset replace | 2 | $ 749.00 | 8.22% | 5 | $ 166.96 | $ 915.96 | $ 183.19 | $ 15.27 | $ 7.63 |
| | 3 | Window replacement | 1 | $ 1,968.00 | 8.22% | 5 | $ 438.69 | $ 2,406.69 | $ 481.34 | $ 40.11 | $ 40.11 |
| | 4 | Elec wiring replacement | 1 | $ 14,402.00 | 8.22% | 10 | $ 6,767.76 | $ 21,169.76 | $ 2,116.98 | $ 176.41 | $ 176.41 |
| | 5 | Kitchen renovation | 1 | $ 17,202.00 | 8.22% | 10 | $ 8,083.54 | $ 25,285.54 | $ 2,528.55 | $ 210.71 | $ 210.71 |
| | 6 | Refrigerator | 1 | $ 895.00 | 8.22% | 10 | $ 420.58 | $ 1,315.58 | $ 131.56 | $ 10.96 | $ 10.96 |

*Use the amortization table in this Attachment and the information about interest rates. Fill in columns (a) through (f) and then columns (g) through (k) will fill in automatically.

Total for Base Year: $ 38,299

[add amounts in column (d)]

Total annual cost (sum of (i)): $ 5,895

## 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 |
|---|---|---|---|---|
| January 2024 | 6 | 35 | 2 | emptying and cleaning front and back porches |
| June 14-17, 2024 | 12 | 35 | 1 | emptying and cleaning 307 |
| July 22-25, 2024 | 12 | 35 | 1 | emptying and cleaning 307 |
| July 30-31, 2024 | 12 | 35 | 2 | yard work, paths, garage cleaning |

## 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) Item # | (b) Brief Description and Expected Date of Completion | (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.

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

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

~~14~~ 18

## XV. Net Operating Income (NOI)

Net Operating Income = Income – Operating Expenses

| | Base Year (2023) | Current Year (2024) |
|---|---|---|
| 1. Total Annual Income | $ 51,136 | $ 51,734.57 |
| 2. Annual Operating Expenses | $ 30,988 | $ 36,088.90 |
| 3. Net Annual Operating Income | $ 20,148 | $ 15,645.67 |
| 4. CPI [Annual Average CPI] | ~~281.082~~ 326.016 | 336.376 |
| 5. Percent Annual Increase in CPI Base Year to Current Year<br>$\frac{\text{Line 4 Current Year-Line 4 Base Year}}{\text{Line 4 Base Year}} \times 100$ | | ~~19.67~~ 3.18 % |
| 6. Fair Net Annual Operating Income = Base Year Net Operating Income Adjusted by CPI Increase<br>$\frac{\text{Line 5} + 100}{100} \times \text{Line 3 Base Year}$ | | 20,788.71<br>$ ~~24,111.11~~ |
| 7. Fair Net Annual Operating Income Minus Current Net Operating Income = Allowable Rent Increase<br>Line 6 – Line 3 Current Year | | $143.04<br>$ ~~8465.44~~ |
| 8. Allowable Rent Increase/Unit/Month[3]<br>Line 7 ÷ 12 ÷ # of Units | | 214.29<br>$ ~~352.73~~ |

[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 |
|---|---|---|---|---|---|---|---|
| 305 305 | $ 2400 ~~2400~~ | $ | 10/24-9/25 | % | % | $ | |
| 305 305 | $ 2620 ~~2620~~ | $ | 9/24-10/24 | % | % | $ | per rent board decision December 2024 (see attached document) I banked $505 in rent and can raise by 10%accordingly to move toward fair market value for the house and to keep up with the improvements that we need to make. |
| 307 307 | $ 1942 ~~1942~~ | $ | 9/24-12/24 | % | % | $ | |
| 307 307 | $ 2136 ~~2136~~ | $ | 1/25-10/25 | % | % | $ | |
| | $ | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |

~~22~~

| | | | | | | |
|---|---|---|---|---|---|---|
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |

28

~~28~~

## 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 allocat__l _____

| 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 |
|---|---|---|---|---|---|---|---|
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |

21

~~24~~

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ |

22

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## 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.
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.

24

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.

25

## 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) | $ _____ | $ _____ |
| 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.

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## 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] | 281.082 | 336.376 |

5. Percent Annual Increase in CPI Base Year to Current Year

$$\frac{\text{Line 4 Current Year-Line 4 Base Year}}{\text{Line 4 Base Year}} \times 100$$

_____ %

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.

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## 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:

31 SUPPORTING DOCS

pg 6 line 1

2023 124

2023
This is based on the 5/1/2024 Notice of Violation and Order to Correct Attachment page 6 line 1-.
305: Based on Attachment p.6 line 1-12 "FY 2023 ... maximum amount that a tenant can be charged was $16,497.74." This number includes 7 months of allowable rent that started in 2023. $16, 497.74/ 7= $2356.82
2356.82 X 12=28,281.84

307: Based on Attachment p.6 line 1-13, "FY 2023 ... The maximum rent that could be charged for the unit is $22,854.24."
28,281.84+22, 854.24=51,136.08
Total Gross scheduled rental income, including uncollected rent for 2023=. $51,136.08

2024
305. Tenant allowable rent continued to be $2356.82 for January-September 2024 because their lease started October 1, 2023 so it could only be raised after 12 months. Allowable increase for 2024 was 2%, so from October-December 2024 the allowable rent was 2403.96.
2356.82 x 9 = 21,211.38
2403.96 x 3 = 7211.87
Total = 28,423.25

307
Based on the 5/1/2024 Notice of Violation and Order to Correct FY 2024 "The maximum amount of rent that could be charged for the unit is $9713.05" This number includes 5 month of allowable rent for 2024. $971.05/ 5 = 1942.61. So allowable rent for 2024, according to the Notice of Violation was 1942.61 a month x 12 = 23,311.32
28,423,25 = 23, 311.32 = 51,734.57
Total gross scheduled rental income, including unclollected rent for 2024 = 51, 734.57

Page 6 line 1-2

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

2023-24

05/01/2024
Case Number: RCC2400012
Business License Number: 20170812

Anna Kuperman
17 12th Street
Providence, RI 02906

## NOTICE OF VIOLATION AND ORDER TO CORRECT

Anna,

The City of Portland Permitting and Inspections Department inspected the rental data for the located at 305-307 Deering Ave on **May 1, 2024** and found violations of the City of Portland Code of Ordinances, which are listed on the attached page(s). You are hereby ordered to correct these violations by **June 1, 2024**. Please be advised that penalties will be applied if the violations are not corrected by that date.

If you do not correct the attached violations by the date given, then this matter will be referred to the City of Portland Corporation Counsel for legal action, and you will be charged $150 for re-inspection per the City's fee schedule. In the event of court action, the City may be entitled to an order to correct the violations, civil penalties in the minimum of $100 per violation per day, costs and fees, and other relief under §1-15 of the City Code and 30-A M.R.S. §4452.

Please respond in writing via email to rentcontrol@portlandmaine.gov or send response by USPS to 389 Congress St, Portland, Maine 04101.

**You have a right to appeal this decision to Superior Court within 30 days of the date of this notice pursuant to Rule 80B of the Maine Rules of Civil Procedure.**

I appreciate your anticipated cooperation, and please contact our office by calling 207-874-8900 if you have any questions.

Thank you,

Adam O'Connor
Rental Registration Inspector

Page 6 line 1-3

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

2023 & 24

## NON-COMPLIANCE VIOLATION LIST

| | |
|---|---|
| **APPLICABLE CODE SECTION(S)** | City Code 6-234 |
| **CODE DESCRIPTION** | Landlords may not charge more than base rent plus any allowable increases under Sec. 6-234 |
| **COMMENTS** | Landlords must reduce the rent to within the required amount and reimburse any excess rent collected to any tenants who were overcharged. |
| **RENTAL REIMBURSEMENT** | **UNIT 305**<br><br>The tenant was charged **$2,800** month as rent for the unit from starting in October 2023.<br><br>The tenant has paid rent in the amount of **$19,600** during the course of their lease. The maximum amount that can be charged was **$16,497.74**.<br><br>Resulting in the tenant being overcharged a total of **$3,102.26.**<br><br>The tenant must be made whole by reimbursing the amount overcharged **($3,102.26)**.<br><br>Reimbursement may be issued directly to the tenant via check or as a credit for future rent payments.<br><br>Please work with your tenant to resolve this issue and notify the City when settled.<br><br>You must notify the City by the deadline date below when the matter has been resolved.<br><br>Notification must be made in writing. Send any pertinent documents via USPS or by email to rentcontrol@portlandmaine.gov. |
| **DEADLINE** | 06/01/2024 |

page 6 line 1-4

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

2023 $24

## NON-COMPLIANCE VIOLATION LIST

| | |
|---|---|
| **APPLICABLE CODE SECTION(S)** | City Code 6-234 |
| **CODE DESCRIPTION** | Landlords may not charge more than base rent plus any allowable increases under Sec. 6-234 |
| **COMMENTS** | Landlords must reduce the rent to within the required amount and reimburse any excess rent collected to any tenants who were overcharged. |
| **RENTAL REIMBURSEMENT** | **UNIT 307**<br><br>FY2021:<br>The unit was charged a total of **$21,400** in rent.<br><br>The maximum amount of rent that could be charged for the unit is **$20,400.**<br><br>Resulting in the tenant being overcharged a total of **$1,000** for the year.<br><br>FY2022:<br>The unit was charged a total of **$24,600** in rent.<br><br>The maximum amount of rent that could be charged for the unit is **$21,359.16.**<br><br>Resulting in the tenant being overcharged a total of **$3,240.84** for the year.<br><br>FY2023:<br>The unit was charged a total of **$26,400** in rent.<br><br>The maximum amount of rent that could be charged for the unit is **$22,854.24.**<br><br>Resulting in the tenant being overcharged a total of **$3,545.76** for the year.<br><br>-----Continued on next page----- |

page 6 line 1-5
2023 Y 24

## NON-COMPLIANCE VIOLATION LIST

| | |
|---|---|
| **RENTAL REIMBURSEMENT** | FY2024 (year to date):<br>The unit was charged a total of **$11,220** in rent.<br><br>The maximum amount of rent that could be charged for the unit is **$9,713.05.**<br><br>Resulting in the tenant being overcharged a total of **$1,506.95** for the year.<br><br>Summary of Overcharges:<br>**2021: $ 1,000.00**<br>**2022: $ 3,240.84**<br>**2023: $ 3,545.76**<br>**2024: $ 1,506.95**<br>**Total $ 9,293.55**<br><br>The tenant must be made whole by reimbursing the amount overcharged ($9,293.55).<br><br>Reimbursement may be issued directly to the tenant via check or as a credit for future rent payments.<br><br>Please work with your tenant to resolve this issue and notify the City when settled.<br><br>You must notify the City by the deadline date below when the matter has been resolved.<br><br>Notification must be made in writing. Send any pertinent documents via USPS or by email to rentcontrol@portlandmaine.gov. |
| **DEADLINE** | 06/01/2024 |

DOCUMENT CONTAINS COLORED BACKGROUND ON WHITE PAPER. "VOID" FEATURE, SIMULATED WATERMARK (REVERSE SIDE) MICRO-PRINT BORDER.

PLEASE POST THIS PAYMENT FOR OUR MUTUAL CUSTOMER

Account: PAYMENT

$1,000.00

7445/2112

Please Direct Any Questions To
(800) 243-2508
Online Bill Payment Processing Center

THERESA NGUYEN
305 DEERING AVE
PORTLAND, ME 04103

0000995011

November 27, 2024

TD BANK, N.A.

1184 0856 EPY 07 1122 1/2 53380423.1 00053943

Pay ONE THOUSAND AND 00/100 ---------- DOLLARS

TO THE ORDER OF
ANNA KUPERMAN
17 12TH ST
PROVIDENCE, RI 02906-2924

00053943
K103

$ *****1,000.00

Void After 180 DAYS.
*Signature On File*
This check has been authorized by your depositor

WARNING: THIS BORDER CONTAINS MICROTYPE WHICH WILL NOT REPRODUCE ON A COPIER.

⑈995016⑈ ⑆211274450⑆ 242969163⑈ 179

DOCUMENT CONTAINS COLORED BACKGROUND ON WHITE PAPER. "VOID" FEATURE, SIMULATED WATERMARK (REVERSE SIDE) MICRO-PRINT BORDER.

PLEASE POST THIS PAYMENT FOR OUR MUTUAL CUSTOMER

Account: 198613445081

$1,000.00

7426/3140

Please Direct Any Questions To
(800) 278-6302
Online Bill Payment Processing Center

JESSICA S MCMILLEN
2420 MCGINNIS DR
NASHVILLE, TN 37216-4202

0000995015

November 29, 2024

USAA FEDERAL SAVINGS BANK

1184 0856 EPY 07 1122 2/2 53380423.1 00053943

Pay ONE THOUSAND AND 00/100 ---------- DOLLARS

TO THE ORDER OF
ANNA KUPERMAN
17 12TH ST
PROVIDENCE, RI 02906-2924

$ *****1,000.00

Void After 180 DAYS.
*Signature On File*
This check has been authorized by your depositor

WARNING: THIS BORDER CONTAINS MICROTYPE WHICH WILL NOT REPRODUCE ON A COPIER.

⑈995015⑈ ⑆314074269⑆ 018564588 7⑈

1316

52-8756/2112
BRCH01

CHECK ALWAYS INVISIBLE

Photo Safe Deposit Check Inside

MP

NATHANIEL SETH LEVY
PO BOX 10984
PORTLAND, ME. 04104

11/28/2024 Date

Pay to the Order of Anna Kuperman $ 1,000.00

one thousand and 00/100 Dollars

For Gift Dept

ATLANTIC Federal Credit Union
PO Box 188
Brunswick, Maine 04011
www.atlanticfcu.com

⑆211287560⑆ 700140790586⑈ 1316

36
Page 6 line 1-6
2024

# 37 AMENDMENT TO LEASE AGREEMENT

Page 6 line 2024

LANDLORD Anna Kuperman

TENANT Jessica Sydney McMillen and Theresa Nguyen

PROPERTY ADDRESS 305 Deering Ave. Portland ME 04103

This Amendment is made a part of the Residential Lease Agreement (Lease) dated October 1, 2023 between (Landlord's Name) Anna Kuperman, Landlord and (Tenant's Name) Jessica Sydney McMillen and Theresa Nguyen, Tenant(s), for the Leased Premises located at Property Address listed above.

The Lease Agreement will be amended as follows:

Amendment 1

Rent is $2350/monthly June-September 2024

Rent is $2400/monthly October 2024-July 2025

Amendment 2

Tenants pay $2000 June 2024-January 2025
Tenants pay $2400 February 2025-July 2025

$3000 difference in rent owed and rent paid to go towards reimbursement as suggested by Rent Control Board for October 2023-May 2024.

Except as modified by this Amendment, Landlord and Tenant(s) ratify the Lease and agree that the Lease shall remain unchanged and shall continue in full force and effect. In the event of any conflict between the provisions of the Lease and this Amendment, the provisions of this Amendment will control. From the date of signature below, any and all reference to "Lease" and/or "Lease Agreement" shall mean the Lease as modified by this Amendment.

TENANT SIGNATURE [signature] DATE 6/7/24

OWNER SIGNATURE [signature] DATE 6/1/2024

page 7 line 21

38

# CITY OF PORTLAND, ME

## Real Estate Paid Tax Statement

2023

**Parcel:** 117-C-001-001
**Location:** 305 DEERING AVE

**Owner:**
KUPERMAN ANNA &
MARINA KUPERMAN-BEADE
17 12TH ST
PROVIDENCE RI 02906

**Status:**
Square 0

| | |
|---|---|
| Land Valuation: | 144,700 |
| Building Valuation: | 834,200 |
| Exemptions: | 0 |
| Taxable Valuation: | 978,900 |

**Deed Date:** 07/26/2022 **Book/Page:** 39609/267

| Year | Type | | Due Date | Principal Due | Int/Pen | Date | Type | Amount |
|---|---|---|---|---|---|---|---|---|
| 2023 | RE-R | 1 | 11/04/2022 | 4,910.49 | 0.00 | 10/12/2022 | PAID | 4,910.49 |
| | | 2 | 03/17/2023 | 4,910.49 | 0.00 | 10/12/2022 | | 4,910.49 |
| Bill #: 35398 | | | | 9,820.98 | 0.00 | | | 9,820.98 |
| Grand Totals | | | | 9,820.98 | 0.00 | | | 9,820.98 |

** End of Report - Generated by Hannah Burton **

Report generated: 09/25/2025 08:27:27
User: Hannah Burton (HBURTON)
Program ID: bxtaxstm

Page 7 line 2-2

39

# CITY OF PORTLAND, ME

## Real Estate Paid Tax Statement

2024

**Parcel:** 117-C-001-001
**Location:** 305 DEERING AVE

**Owner:**
KUPERMAN ANNA &
MARINA KUPERMAN-BEADE
17 12TH ST
PROVIDENCE RI 02906

**Status:**
**Square** 0

| | |
|---|---|
| Land Valuation: | 144,700 |
| Building Valuation: | 834,200 |
| Exemptions: | 0 |
| Taxable Valuation: | 978,900 |

**Deed Date:** 07/26/2022 **Book/Page:** 39609/267

| Year | Type | | Due Date | Principal Due | Int/Pen | Date | Type | Amount |
|---|---|---|---|---|---|---|---|---|
| 2024 | RE-R | 1 | 10/19/2023 | 5,199.13 | 0.00 | 09/25/2023 | PAID | 5,199.13 |
| | | 2 | 03/14/2024 | 5,199.13 | 0.00 | 09/25/2023 | | 5,199.13 |
| **Bill #** | **2409744** | | | **10,398.26** | **0.00** | | | **10,398.26** |
| **Grand Totals** | | | | **10,398.26** | **0.00** | | | **10,398.26** |

** End of Report - Generated by Hannah Burton **

Page

Report generated: 09/25/2025 08:28:06
User: Hannah Burton (HBURTON)
Program ID: txtaxstm

40

page 7 line 4-1

Gmail

Anna Kuperman <annakuperman@gmail.com>

# Fwd: Payment Confirmation - City of Portland, ME

1 message

**Anna Kuperman** <annakuperman@gmail.com> Wed, Dec 20, 2023 at 9:08 PM
To: Anna K <annakuperman@gmail.com>

Begin forwarded message:

**From:** noreply@mygovpay.com
**Date:** December 18, 2023 at 3:11:10 PM EST
**To:** ANNAKUPERMAN@gmail.com
**Subject: Payment Confirmation - City of Portland, ME**

MyGovPay
EMPOWERED BY TYLER TECHNOLOGIES

## City of Portland, ME

**Payment Confirmation**

| | |
|---|---|
| **Payment Date** | Monday, December 18, 2023 |
| **Order Number** | 61654 |

**Line Items**

| Invoice # | Item Description | Quantity | Unit Price | Total Price |
|---|---|---|---|---|
| INV-00093116 | 20170812 | 1 | $100.00 | $100.00 |

| | |
|---|---|
| **Item Total** | $100.00 |
| **Convenience Fee** | $1.00 |
| **Order Total** | **$101.00** |

Thank you for your payment,

City of Portland, ME

Pair

# RECEIPT (REC-081147-2023) FOR CITY OF PORTLAND

Page 7 line 4-D

**BILLING CONTACT**
Anna Kuperman
17 12th
Providence, RI 02906

Payment Date: 12/18/2023

| Reference Number | Fee Name | Transaction Type | Payment Method | Amount Paid |
|---|---|---|---|---|
| 20170812 | Long Term Rental Registration Fee | Fee Payment | ECheck | $100.00 |
| | | | **SUB TOTAL** | **$100.00** |

305 DEERING AVE Portland, ME

**TOTAL** **$100.00**

42

# THE ANDOVER COMPANIES

Merrimack Mutual Fire Insurance Company Founded 1828 | Bay State Insurance Company Founded 1955
Cambridge Mutual Fire Insurance Company Founded 1833

## Renewal Declaration

| POLICY NUMBER | POLICY PERIOD | AGENT NO. | AGENT |
|---|---|---|---|
| FP24057304 | 05/28/2023 to 05/28/2024<br>12:01 AM Standard Time | 7088 | Telephone: 207 370-6773 |

| NAME AND ADDRESS | |
|---|---|
| ANNA KUPERMAN<br>C/O THE ESTATE OF SAVELY KUPERMAN<br>17 12TH ST<br>PROVIDENCE RI 02906-2924 | LOTFEY DENNETT INS BROKERS<br>500 WASHINGTON AVE STE 3<br>PORTLAND ME 04103-5334 |

In return for the payment of the premium, and subject to all the terms of this policy, we agree to provide the insurance as stated in this policy.

**Full Named Insured**

The Estate Of Savely Kuperman

**Issuing Company**

Merrimack Mutual Fire Insurance Company

**Location 1 Described Location Address**

305 Deering Ave Portland ME 04103-4856

**Rating Information:** Frame Construction, 2 Family, Protection Class 2, Territory 30, Tenant occupied dwelling, Year built 1924, BCEG 99

**Deductible:** In case of a loss, we cover only that part of the loss over $1,000.

COVERAGE AT THE ABOVE DESCRIBED LOCATION IS PROVIDED ONLY WHERE A LIMIT OF LIABILITY IS SHOWN OR A PREMIUM IS STATED

| Coverages | Limits of Liability | Premium for Perils Insured Against | | |
|---|---|---|---|---|
| | | Fire | Special Form | Total Premium |
| A - Dwelling | $894,000 | $998.00 | $1,683.00 | $2,681.00 |
| B - Other Structures | 10% of Coverage A - See Policy Forms | | | $0.00 |
| C - Personal Property | $10,000 | $11.00 | $19.00 | $30.00 |
| D - Fair Rental Value | Actual Loss Sustained - See D-142 | | | $0.00 |
| E - Additional Living Expense | Included in Coverage D | | | $0.00 |
| Premises Liability | $1,000,000 | | | $91.00 |
| Medical Payments per person | $5,000 | | | $21.00 |
| per accident | $25,000 | | | |

Continued on Next Page

# THE ANDOVER COMPANIES

Merrimack Mutual Fire Insurance Company Founded 1828 | Bay State Insurance Company Founded 1955
Cambridge Mutual Fire Insurance Company Founded 1833

## Renewal Declaration

2023

| POLICY NUMBER | POLICY PERIOD | AGENT NO. | AGENT |
|---|---|---|---|
| FP24057304 | 05/28/2023 to 05/28/2024<br>12:01 AM Standard Time | 7088 | Telephone: 207 370-6773 |

**NAME AND ADDRESS**

ANNA KUPERMAN
C/O THE ESTATE OF SAVELY KUPERMAN
17 12TH ST
PROVIDENCE RI 02906-2924

LOTFEY DENNETT INS BROKERS
500 WASHINGTON AVE STE 3
PORTLAND ME 04103-5334

| Form Number | Form Title |
|---|---|
| DL2443 03/04 | Lead Poisoning Exclusion Maine |
| D905 01/22 | Enhanced Home Repair or Replacement Cost Protection |
| DP0411 12/02 | Automatic Increase in Insurance |
| DP0422 07/14 | Limited Fungi Wet or Dry Rot or Bacteria Coverage |
| DP0470A 01/22 | Premises Alarm or Protective Device System |
| DP0695A 01/22 | Broadened Water Back Up and Sump Discharge or Overflow Coverage |
| DP0471 12/02 | Ordinance or Law Increased Amount of Coverage DP2 & DP3 only |
| DL2471 12/02 | Limited Fungi Wet or Dry Rot or Bacteria Coverage |
| DL2518 05/16 | Special Provisions Maine |
| D962 01/22 | Dwelling Liability Amendatory |

**Total Annual Premium.....$2,695.00**

**Notices:**

| | |
|---|---|
| P-714 06/21 | Payment Plan Information Notice |
| ILP001 01/04 | OFAC Advisory Notice to Policyholders |
| H-943 04/18 | Privacy Notice |
| HF-153 06/14 | Important Flood Notice |
| D961 01/22 | Policyholder Notice |

04/10/2023
Countersignature of Authorized Agent (where required) — Date

Please Note:
All policy changes should be processed through your agent.

Pg. 7 line 5-3

2024

THE ANDOVER COMPANIES.

• EST 1828 •

MERRIMACK MUTUAL FIRE INSURANCE COMPANY FOUNDED 1828
CAMBRIDGE MUTUAL FIRE INSURANCE COMPANY FOUNDED 1833
BAY STATE INSURANCE COMPANY FOUNDED 1955

**Payment Details:**

| | |
|---|---|
| Policy Number: | FP24057304 |
| Payment Amount: | $2939.00 |
| Remittance ID: | 355507012 |

**Total Payment: $2939.00**

Payment Scheduled Date: 05/27/2024
Transaction Type: ACH
Partial Account No: ****5081
Billing Information: Anna Kuperman

45

Page 7 line 6-1

2024

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2402-004

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Customer: | Anna Kuperman<br>17 12th Street<br>Providence, RI 02906 | | | | | | |
| Date of this invoice: | 26 August 2024 | | | | | | |
| Job name: | KUPERMAN | | | | | | |
| **Work completed:** | Rent Board petition project | | | | | | |
| **Labor** | | | | | | | |
| Heartwood labor | 7/22/24-8/8/24 | 15 | hrs. @ | $55.00 | /hr. | | $825.00 |
| **Materials** | | | | | | | |
| | | | | | | | ---------- |
| | | | | | | Sub-total: | $825.00 |
| | | | | | | Builder's fee: 15% of materials: | $0.00 |
| | | | | | | | ---------- |
| | | | | | | Total: | $825.00 |
| | | | | | | **BALANCE DUE:** | **$825.00** |

page 7 line 6-2

2024

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2402-009

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Customer: | Anna Kuperman<br>17 12th Street<br>Providence, RI 02906 | | | | | | |
| Date of this invoice: | 1 November 2024 | | | | | | |
| Job name: | KUPERMAN | | | | | | |
| **Work completed:** | Rent Board petition project | | | | | | |
| **Labor** | | | | | | | |
| Heartwood labor | 8/9/24-10/31/24 | 9.75 | hrs. @ | $55.00 | /hr. | | $536.25 |
| **Materials** | | | | | | | |
| | | | | | | Sub-total: | $536.25 |
| | | | | | | Builder's fee: 15% of materials: | $0.00 |
| | | | | | | Total: | $536.25 |
| | | | | | | **BALANCE DUE:** | **$536.25** |

47

Page 7 line 6-3

2024

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| | | | | | | Invoice #2402-012 | |
| Customer: | Anna Kuperman | | | | | | |
| | 17 12th Street | | | | | | |
| | Providence, RI 02906 | | | | | | |
| Date of this invoice: | 31 December 2024 | | | | | | |
| Job name: | KUPERMAN | | | | | | |
| **Work completed:** | Rent Board petition project | | | | | | |
| **Labor** | | | | | | | |
| Heartwood labor | 11/1/24 - 12/30/24 | 24 | hrs. @ | $55.00 | /hr. | | $1,320.00 |
| **Materials** | | | | | | | |
| | | | | | | | ---------- |
| | | | | | | Sub-total: | $1,320.00 |
| | | | | | Builder's fee: 15% of materials: | | $0.00 |
| | | | | | | | ---------- |
| | | | | | | Total: | $1,320.00 |
| | | | | | | | |
| | | | | | | **BALANCE DUE:** | **$1,320.00** |

Pg. 7 line D

48

Learn More

OK

CLOSE

Pg. 7 line 8-1

Docusign Envelope ID: EB6E5D09-732F-4293-9612-8E0A0BFB4ADD

2023

To whom it may concern,

In 2023 the Kuperman family contacted me to assist in finding applicants for them to determine qualifications to rent 1 of 2 units at 305 Deering Avenue, Portland.

Services were rendered and payment of $1400 was satisfied on October 5th, 2023.

All my Best,

Joel Turgo

Joel Turgo

8/5/2024 | 11:39 AM EDT

**ANNA KUPERMAN**
17 12TH ST
PROVIDENCE, RI 02906-2924

174
52-60/112
133

December 15 2024
Date

Pay to the Order of Anna Kuperman $ 5,000—

Five-Thousand + 00/100 Dollars

Photo Safe Deposit® Details on back

KeyBank National Association
1-800-KEY2YOU® Key.com®

For property management 305 Deering St. Inc.

⑆011200608⑆ 198613445081⑈ 0174

Harland Clarke

L

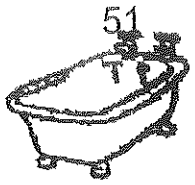
Pg 7 line 8-2
2024

KUPERMAN RESIDENCE
GENERAL REPAIRS

| Date | Purpose | Vendor | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---|---|---|---|---|---|---|
| **2019** | | | | | | | | |
| **2020** | | | | | | | | |
| **2021** | | | | | | | | |
| 6/23/21 | Sewer line snake | Zoom Drain | | | $674 | | | |
| **2022** | | | | | | | | |
| 6/22/22 | Back door repair | Heartwood Builders | | | | $25 | | |
| 6/26/22 | Roof deck patch | | | | | $180 | | |
| **2023** | | | | | | | | |
| 5/16/23 | Tub repair | Rick's Tub | | | | | $250 (p. 7 Line 12-1) | |
| 9/20/23 | 305 fridge repair + front door lockset + drain fix + misc | Heartood Builders | | | | | $435 (p. 7 Line 12-2) | |
| 10/13/23 | No heat repair | Doghouse Energy | | | | | $155 (p. 7 Line 12-3) | |
| 11/1/23 | No-heat repair | Doghouse Energy | | | | | $243 (p. 7 Line 12-6) | |
| 11/12/23 | No-heat visit+toilet leak+switch+adjust doors | Heartood Builders | | | | | $578 (p.7 Line 12-4) | |
| 12/15/23 | toilet repair+adjust door+water filter remove+dryer handle repair | Heartood Builders | | | | | $812 (p.7 Line 12-5) | |
| **2024** | | | | | | | | |
| 3/15/24 | 305 kit faucet repair | Heartwood Builders | | | | | | $83 |
| 8/26/24 | 305 faucet repairs | Heartwood Builders | | | | | | $427 |
| 8/26/24 | 307 repairs + locksets | Heartwood Builders | | | | | | $895 |
| | | **TOTAL:** | $0 | $0 | $674 | $205 | 2081 | $1,405 |

Pg. 7 line 12-1

Normal repairs 2020-23



# RICK'S TUB & SHOWER REPAIR

## REPAIRING SINCE 1979

Pg. 7 line 12-2

2023

**Rick Hasson/Shena Swain**

Fiberglass & Acrylic Repairs
New & Old Tubs/Showers

Tel 207-387-3479
141 Lunts Hill Rd
Litchfield, ME 04350

| DATE | INVOICE # |
|---|---|
| 5-16-23 | 7895 |

| BILL TO | JOB LOCATION |
|---|---|
| Paid on site check # 704 | 307 Deering Ave<br>Portland, ME |

| TELEPHONE |
|---|
| Amanda Hannan 617-306-2762 |

| P.O. NUMBER | TECHNICIAN |
|---|---|
| | Shena |

| ITEM | DESCRIPTION | SERVICED | AMOUNT |
|---|---|---|---|
| 60" t/s<br>off white<br>$2/KW | 8" crack bottom | [redacted]<br>5/16/23 | 250.00 |

Fiberglass and acrylic repairs are guaranteed for one year unless otherwise specified. Repair is not guaranteed against chipping, scratching or man made damage.

TERMS & CONDITIONS:
Balance due upon completion of work, 1 ½ % per month after 30 days.

| TOTAL | $250.00 |
|---|---|

page 7 · line 12-3

INVOICE

2023

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

| | | |
|---|---|---|
| Customer: | Anna Kuperman<br>17 12th Street<br>Providence, RI 02906 | Invoice #2311-001 |
| Date of this invoice: | 20 September 2023 | |
| Job name: | KUPERMAN | |

**Work completed:**
1st fl bathroom fan replacement
DW installation/basement plumbing
Coordinate water heater replacement
Refrigerator repair
Keys/unclog drain/replace den bulbs/repair front door lockset

| | | | | | |
|---|---|---|---|---|---|
| **Labor** | | | | | |
| Heartwood labor | 8/25/23-9/4/23 | 31.25 | hrs. @ | $55.00 /hr. | $1,718.75 |
| **Materials** | | | | | |
| Appliance Doctor | 9/4/23 | | | | $305.00 |
| Downeast Appliance | 8/22/23 | | | | $790.20 |
| Home Depot | 8/22/23-8/31/23 | | | | $273.09 |
| Maine Hardware | 8/26/23 | | | | $15.77 |
| Riverside Recycling | 8/26/23 | | | | $14.00 |
| | | | | Sub-total: | $3,116.81 |
| | | | | Builder's fee: 15% of materials: | $161.86 |
| | | | | Total: | $3,278.67 |
| | | | | **BALANCE DUE:** | $3,278.67 |

Repairs: Fridge repair
Front door lockset repair
Unclog drain.
bulb replacement
} $435

Capital Improvements: $2,843

Page 7 line 12-4

2023

Dog House
HEATING · AIR · PLUMBING

Dog House
P.O. Box 405, Freeport, Maine 04032 United States
(207) 865-0989
www.calldoghouse.com

Invoice 29491128
Invoice Date 10/13/2023
Completed Date 10/13/2023
Customer PO
Payment Term Due Upon Receipt
Due Date 10/13/2023

Billing Address
Anna Kuperman Rental1
305 Deering Avenue
Portland, ME 04103 USA

Job Address
Anna Kuperman Rental1
305 Deering Avenue
Portland, ME 04103 USA

**Description of Work**

No heat. Found that the thermostats wires were never reconnected back to the boiler. Reconnected thermostat and tested operations. Noticed that system was slightly overfilled. Drained water down until visible in glass. Recommend that automatic water feeder be installed as well to ensure that system does not run low on water. Will need to provide estimate.

| Task # | Description | Quantity | Your Price | Your Total |
|---|---|---|---|---|
| labor rate 30 minutes add on | Additional 30 minutes of time required | 1.00 | $154.50 | $154.50 |

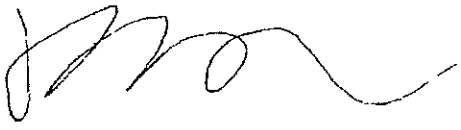
| Paid On | Type | Memo | Amount |
|---|---|---|---|
| 10/13/2023 | MasterCard | | $154.50 |

| | |
|---|---|
| Potential Savings | $15.45 |
| Sub-Total | $154.50 |
| Tax | $0.00 |
| Total Due | $154.50 |
| Payment | $154.50 |
| Balance Due | $0.00 |

Thank you for choosing Dog House !

This invoice is agreed to and acknowledged. Payment is due upon completion. A service fee of $35.00 will be charged for any returned checks, and a financing charge of 1.5% per month shall be applied for overdue amounts.

10/13/2023
I find and agree that all work performed by Dog House has been completed in a satisfactory and workmanlike manner. I have been given the opportunity to address concerns and/or discrepancies in the work provided, and I either have no such concerns or have found no discrepancies or they have been addressed to my satisfaction. My signature here signifies my full and final acceptance of all work performed by the contractor.



10/13/2023
I authorize Dog House 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.

10/13/2023

p. 7 line 12-5

# INVOICE

2023

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Customer: Anna Kuperman
17 12th Street
Providence, RI 02906

Invoice #2311-002

Date of this invoice: 17 November 2023

Job name: KUPERMAN

**Work completed:** No-heat repair
Mtgs Theresa
Site visits: window replacement/close window/toilet leak/light switch/adjust doors

| | | | | | |
|---|---|---|---|---|---|
| **Labor** | | | | | |
| Heartwood labor | 9/7/23-11/17/23 | 10.5 | hrs. @ | $55.00 /hr. | $577.50 |
| **Materials** | | | | | |

Sub-total: $577.50
Builder's fee: 15% of materials:
Total: $577.50

**BALANCE DUE: $577.50**

55

pg. 7 line 12-6

# INVOICE

2023

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2311-003

Customer: Anna Kuperman
17 12th Street
Providence, RI 02906

Date of this invoice: 15 December 2023

Job name: KUPERMAN

**Work completed:**
Toilet repair (2)
Bathroom sink faucet diagnosis
Adjust bedroom door
Water filter removal + valve installation
Dryer repair

| | | | | | |
|---|---|---|---|---|---|
| **Labor** | | | | | |
| Heartwood labor | 11/18/23-12/15/23 | 10.5 | hrs. @ | $55.00 /hr. | $577.50 |
| **Materials** | | | | | |
| Appliance Parts Pros | | | | | $33.43 |
| Home Depot | | | | | $91.71 |
| Maine Hardware | | | | | $79.19 |
| | | | | Sub-total: | $781.83 |
| | | | | Builder's fee: 15% of materials: | $30.65 |
| | | | | Total: | $812.48 |
| | | | | **BALANCE DUE:** | $812.48 |

56

KUPERMAN RESIDENCE

GENERAL REPAIRS

| Date | Purpose | Vendor | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | |
|---|---|---|---|---|---|---|---|---|---|
| **2024** | | | | | | | | | |
| 3/15/24 | 305 kit faucet repair | Heartwood Builders | | | | | | $83 | Inv #003 |
| 8/26/24 | 305 faucet repairs | Heartwood Builders | | | | | | $427 | Inv #005 |
| 8/26/24 | 307 repairs + locksets | Heartwood Builders | | | | | | $895 | Inv #005 |
| 12/31/24 | 305 sink repair | Heartwood Builders | | | | | | $429 | Inv #013 |
| 12/31/24 | 307 toilet+dryer repair | Heartwood Builders | | | | | | 205 | Inv #013 |
| | | | | | | | | --- | |
| | | | | | | | | $2,039 | |
| | | | | | | | | | |
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| | | | --- | --- | --- | --- | --- | --- | |
| | | **TOTAL:** | #REF! | #REF! | #REF! | #REF! | #REF! | $4,078 | |



Page 7 line 12-14

*page 7 line 12-*

Page 7 line 12-8
2024

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | | | INVOICE | | | | |
| | | | | | | | | |
| | | | | HEARTWOOD BUILDERS | | | | |
| | | | | 66 Colonial Rd. | | | | |
| | | | | Westbrook, ME 04092 | | | | |
| | | | | Tel: 207-266-8018 | | | | |
| | | | | | | | | |
| | | | | | | | | |
| Customer: | Anna Kuperman | | | | | | Invoice #2402-003 | |
| | 17 12th Street | | | | | | | |
| | Providence, RI 02906 | | | | | | | |
| | | | | | | | | |
| Date of this invoice: | 15 March 2024 | | | | | | | |
| | | | | | | | | |
| Job name: | KUPERMAN | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| **Work completed:** | kitchen faucet repair | | | | | | | |
| | | | | | | | | |
| **Labor** | | | | | | | | |
| Heartwood labor | 3/8/24+3/11/24 | | 1.5 | hrs. @ | $55.00 | /hr. | | $82.50 |
| | | | | | | | | |
| **Materials** | | | | | | | | |
| | | | | | | | | |
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| | | | | | | | | |
| | | | | | | | | ---------- |
| | | | | | | | Sub-total: | $82.50 |
| | | | | | | Builder's fee: 15% of materials: | | $0.00 |
| | | | | | | | | ---------- |
| | | | | | | | Total: | $82.50 |
| | | | | | | | | |
| | | | | | | | **BALANCE DUE:** | **$82.50** |

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2024

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2402-005

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Customer: | Anna Kuperman<br>17 12th Street<br>Providence, RI 02906 | | | | | | |
| Date of this invoice: | 26 August 2024 | | | | | | |
| Job name: | KUPERMAN | | | | | | |
| **Work completed:** | Inspect 307 Deering<br>Leaking water line repair<br>Kitchen faucet replacement<br>Bathroom faucet diagnosis/repair<br>Lockset replacement | | | | | | |
| **Labor** | | | | | | | |
| Heartwood labor | 3/13/24-8/25/24 | 15.75 | hrs. @ | $55.00 | /hr. | | $866.25 |
| **Materials** | | | | | | | |
| Home Depot | 3/13/24-8/25/24 | | | | | | $359.29 |
| Zoro | 3/13/24-8/25/24 | | | | | | $37.44 |
| | | | | | | Sub-total: | $1,262.98 |
| | | | | | | Builder's fee: 15% of materials: | $59.51 |
| | | | | | | Total: | $1,322.49 |
| | | | | | | **BALANCE DUE:** | **$1,322.49** |

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2024

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2402-013

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Customer: | Anna Kuperman<br>17 12th Street<br>Providence, RI 02906 | | | | | | | |
| Date of this invoice: | 31 Dec 2024 | | | | | | | |
| Job name: | KUPERMAN | | | | | | | |
| **Work completed:** | 305 Deering: Sink drain and trap replacement | | | | | | | |
| **Labor** | | | | | | | | |
| Heartwood labor | 12/21/2024 | | 5 | hrs. @ | $55.00 | /hr. | | $275.00 |
| **Materials** | | | | | | | | |
| Home Depot | 12/21/2024 | | | | | | | $134.16 |
| | | | | | | | Sub-total: | $409.16 |
| | | | | | | | Builder's fee: 15% of materials: | $20.12 |
| | | | | | | | Total: | $429.28 |
| **Work completed:** | 307 Deering: Toilet repair + dryer duct replacement | | | | | | | |
| **Labor** | | | | | | | | |
| Heartwood labor | 12/27/2024 | | 3 | hrs. @ | $55.00 | /hr. | | $165.00 |
| **Materials** | | | | | | | | |
| Home Depot | 12/27/2024 | | | | | | | $27.50 |
| Maine Hardware | 12/27/2024 | | | | | | | $7.38 |
| | | | | | | | Sub-total: | $199.88 |
| | | | | | | | Builder's fee: 15% of materials: | $5.23 |
| | | | | | | | Total: | $205.11 |
| | | | | | | | **BALANCE DUE:** | **$634.40** |

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2023

DEAD RIVER COMPANY
PO BOX 487
SCARBOROUGH ME 04070-0487
(207) 883-9515 OR 800-287-2043
www.deadriver.com

Ms Amanda Hannan
307 Deering Avenue
Portland, ME 04103

| | |
|---|---|
| Account Number | 814638 |
| Invoice | 56135 |
| Date of Service | 10/10/23 |
| Invoice Total | $381.52 |
| Payment Due Date | 11/19/23 |

# *Service Invoice*

| Qty | Description | Amount | Total |
|---|---|---|---|
| | **Service Location:** 307 Deering Ave./Portland ME 04103 | | |
| | **Work Performed:** Worked On Heating Equipment | | |
| | Oil Burner Service | | |
| | Technician found boiler plugged, soot on top and front . Changed nozzle and electrodes.Recommends a tune up and other repairs. | | |
| | Thank you for choosing Dead River Company! | | |
| 1.0 | ELECTRODE KIT 5780 BECKETT | $48.55 | |
| 1.0 | NOZZLE 1.20 X 80 A | $12.95 | |
| 1.0 | SERVICE SUPPLIES CHARGE | $12.95 | |
| | Total Parts | | $74.45 |
| | Total Labor 1.91 Hours | | $303.69 |
| | State Sales Tax | | $3.38 |

Minimum one hour labor charge
Past due balances incur a late fee (18% ANNUAL PERCENTAGE RATE)
Insufficient funds checks will be charged a $35.00 fee
You can now pay your bill online with MyAccount at www.deadriver.com

DEAD RIVER COMPANY
PO BOX 487
SCARBOROUGH ME 04070-0487
(207) 883-9515 OR 800-287-2043

☐ Change of Address? Check here and fill out the back portion

☐ For credit card payment, please see reverse side

| | |
|---|---|
| ACCOUNT NUMBER: | 814638 |
| DUE DATE: | 11/19/23 |
| AMOUNT DUE: | $381.52 |
| AMOUNT ENCLOSED: | $_____ |

MS AMANDA HANNAN
307 DEERING AVENUE
PORTLAND, ME 04103

Please Mail Your Payments To:

Dead River Company
PO Box 70354
Philadelphia, PA 19176-0354

0755000814638202300003615205613500000000000000000000000006

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Dead River Company

DEAD RIVER COMPANY
PO BOX 467
SCARBOROUGH ME 04070-0467
(207) 883-9515 OR 800-287-9993
www.deadriver.com

Ms Amanda Hannan
307 Deering Avenue
Portland, ME 04103

| INVOICE SUMMARY | |
|---|---|
| Account Number | 814638 |
| Invoice | 49698 |
| Date of Service | 11/24/23 |
| Invoice Total | $423.35 |
| Payment Due Date | 12/30/23 |

2023

PAID

# Service Invoice

11/30/23*5500

## ACCOUNT ACTIVITY

| Qty | Description | Amount | Total |
|---|---|---|---|
| | **Service Location:** ./307 Deering Avenue/./Portland ME 04103 | | |
| | **Work Performed:** Performed Annual Tune Up | | |
| | Annual Tune Up | | |
| | Technician brushed and vacuumed the unit. | | |
| | Changed the nozzle, filter and strainer. | | |
| | Inspected for servicer plan and follow | | |
| | work up needed to qualify. | | |
| | Thank you for choosing Dead River Company! | | |
| | Total System Efficiency 80.00% | | |
| 1.0 | FILTER OIL CARTRIDGE CELLULOSE RF1W/1A-25A | $11.95 | |
| 1.0 | NOZZLE 1.20 X 80 B | $12.95 | |
| 1.0 | PUMP STRAINER SSC-109 /P193 | $12.95 | |
| 1.0 | SERVICE SUPPLIES CHARGE | $12.95 | |
| | Total Parts | | $50.80 |

**SEE REVERSE FOR ADDITIONAL ACTIVITY**

**Minimum one hour labor charge**
**Past due balances incur a late fee (18% ANNUAL PERCENTAGE RATE)**
**Insufficient funds checks will be charged a $35.00 fee**
**You can now pay your bill online with MyAccount at www.deadriver.com**

Dead River Company

DEAD RIVER COMPANY
PO BOX 467
SCARBOROUGH ME 04070-0467
(207) 883-9515 OR 800-287-9993

☐ Change of Address? Check here and fill out the back portion

☐ For credit card payment, please see reverse side

## PAYMENT SECTION

| | |
|---|---|
| ACCOUNT NUMBER: | 814638 |
| DUE DATE: | 12/30/23 |
| AMOUNT DUE: | $423.35 |
| AMOUNT ENCLOSED: | $ |

Total: $805

**Please Mail Your Payments To:**

Dead River Company
PO Box 70354
Philadelphia, PA 19176-0354

MS AMANDA HANNAN
307 DEERING AVENUE
PORTLAND, ME 04103

0755000814638113023000042335049698000000000000000000000000006

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p.7 line 14-3

Gmail

Anna Kuperman <annakuperman@gmail.com>

2023

# Dead River service invoices for 307 Deering Ave. Portland ME Fw: ACCT#814638- INVOICE# 56135 & # 814638

**Amanda** <amandahannan@yahoo.com> Fri, Jan 5, 2024 at 12:44 PM
To: Anna Kuperman <annakuperman@gmail.com>
Cc: amandahannan@yahoo.com

Anna,

These are the invoices for the furnace cleanings to first get it up and running and then to finish the annual cleaning. They had to be on separate dates as they didn't have time to complete a full cleaning on October 10th, but service was necessary at that time just to get the furnace working.

I paid these out of pocket then deducted them from January 2024 rent as you had said you would reimburse for this.

Thanks,

Amanda

----- Forwarded Message -----
**From:** Sharon Picard <sharon.picard@deadriver.com>
**To:** amandahannan@yahoo.com <amandahannan@yahoo.com>
**Sent:** Wednesday, January 3, 2024 at 03:39:59 PM EST
**Subject:** ACCT#814638- INVOICE# 56135

Sharon Picard
Customer Service Representative

Dead River Company - Delivering on A promise.
73 Pleasant Hill Road
Scarborough, ME 04074
Phone: (207)883-9515
Toll Free: 800-287-9993
Fax: (207)883-5921
Email: sharon.picard@deadriver.com

Website | Facebook |

**2 attachments**

**Xerox Scan_01022024113857.PDF**
383K

**Xerox Scan_Service Date 11.24.23.PDF**
376K

361653 p.7 line 16-

2023

Invoice

Qinn's Landscaping + Property Maintenance

| SOLD TO | SHIP TO - from |
|---|---|
| Anna Kuperman | Qinn's Landscaping + Property Maintenance |
| ADDRESS 307 Deering Ave. | ADDRESS |
| CITY, STATE, ZIP Portland, ME | CITY, STATE, ZIP Portland, ME |

| CUSTOMER ORDER NO. | SOLD BY | TERMS | F.O.B. | DATE |
|---|---|---|---|---|
| | | | | |

| ORDERED | SHIPPED | DESCRIPTION | PRICE | UNIT | AMOUNT |
|---|---|---|---|---|---|
| | | services rendered for 2023 | | | |
| | | | | | |
| | - | Snow removal | | | |
| | | | | | |
| | | | | | |
| | | Total Cost for year | | | |
| | - | $5470 | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Paid in full

09-16

adams 5840

Qinn's Landscaping + Property Maintenance

64

P.7 1.-2
16-2

2023

July 30, 2024

GRANT
PROPERTY SERVICES

To Whom It May Concern:

This letter is to confirm receipt of the following payments for services rendered at 305 Deering Ave, Portland ME by Anna Kuperman. My company has been performing regular contracting services, including mostly landscaping, periodically at the address since 2019.

| Month/Year | Amount |
|---|---|
| 10/2019 | $450.00 |
| 06/2020 | $500.00 |
| 11/2020 | $225.00 |
| 01/2021 | $65.00 |
| 07/2021 | $750.00 |
| 09/2021 | $75.00 |
| 11/2021 | $600.00 |
| 05/2022 | $400.00 |
| 10/2022 | $700.00 |
| 04/2023 | $80.00 |
| 06/2023 | $575.00 |
| 12/2023 | $350.00 |
| 07/2024 | $600.00 |

$1,005

Should you have any questions, I may be contacted at (207) 272 - 2268.

Best,

Benjamin Grant
Owner
Grant Property Services, LLC

65

Pg. 7 line 16-3
2023

Grant Property Services, LLC
Benjamin Grant, Owner
54 Cathedral Oaks Dr,
Biddeford ME 04005

GRANT
PROPERTY SERVICES

**Bill to:**
Anna Kupperman
Re: 305 Deering Ave
Portland ME

**Dates:**
4/25/2024

| Description | Amount |
|---|---|
| Clean up | 150 |
| | |
| | |
| | |
| | |
| | |

**Total Due: $150**

Thank you for supporting our small business and please contact us at grantpropertyservicesme@gmail.com with any questions. Invoice may be paid via cash, check (addressed to Grant Property Services, LLC and mail to 54 Cathedral Oaks Dr, Biddeford ME 04005) or Venmo (BenjaminAGrant).

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pg. 7 line 16-4

2024

Grant Property Services, LLC
Benjamin Grant, Owner
54 Cathedral Oaks Dr,
Biddeford ME 04005

GRANT
PROPERTY SERVICES

**Bill to:**
Anna Kupperman
Re: 305 Deering Ave
Portland ME

**Dates:**
July, 2024

| Description | Amount |
|---|---|
| **Hedges, Tree Removal** | **500** |
| | |
| | |
| | |
| | |
| | |

**Total Due: $500**

Thank you for supporting our small business and please contact us at grantpropertyservicesme@gmail.com with any questions. Invoice may be paid via cash, check (addressed to Grant Property Services, LLC and mail to 54 Cathedral Oaks Dr, Biddeford ME 04005) or Venmo (BenjaminAGrant).

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pg. 7 line 16-5

2024

Grant Property Services, LLC
Benjamin Grant, Owner
54 Cathedral Oaks Dr,
Biddeford ME 04005

GRANT
PROPERTY SERVICES

**Bill to:**
Anna Kupperman
Re: 305 Deering Ave
Portland ME

**Dates:**
November, 2024

| Description | Amount |
|---|---|
| Leaf clean up | 450 |
| | |
| | |
| | |
| | |
| | |

**Total Due: $450**

Thank you for supporting our small business and please contact us at grantpropertyservicesme@gmail.com with any questions. Invoice may be paid via cash, check (addressed to Grant Property Services, LLC and mail to 54 Cathedral Oaks Dr, Biddeford ME 04005) or Venmo (BenjaminAGrant).

5:41

Quinn Kapala

pg. 7 line 16-6 2024

Feed | Between You

You paid Quinn Kapala - $60.00
Mar 24, 2024
3/23

You paid Quinn Kapala - $60.00
Feb 16, 2024
snow2/15

You paid Quinn Kapala - $60.00
Jan 30, 2024
1/28 snow

You paid Quinn Kapala - $60.00
Jan 27, 2024
snow 1/24

You paid Quinn Kapala - $60.00
Jan 11, 2024
snow 1/8

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Pg. 7
line 16-7
2024

5:41

Quinn Kapala

Pay or Request

Feed | Between You

You paid Quinn Kapala - $120.00
Feb 05
1/31 and 2/2 2025

You paid Quinn Kapala - $60.00
Jan 27
Snow 1/20/25

You paid Quinn Kapala - $60.00
Jan 13
1/11/25 slow removal

You paid Quinn Kapala - $120.00
Dec 30, 2024
December 2024 snow removal
1

You paid Quinn Kapala - $60.00
Apr 13, 2024
4/5 snow

6:58

PAGE 7 LINE 17-1

2023

Payment details

RL

# Rodney Lajoie

"cleaning"

- $650

## Social activity

♥ 1 💬 0

## Status

Complete

## Payment method

CITIZENS BANK, NATIONAL ASSOCIATION Personal Checking

Bank •• 5785

## Transaction details

August 21, 2023, 12:20 PM · Public

## Paid to

@Rodney-Lajoie-1

## Type of transaction

Payments between friends

## Transaction ID

[redacted]

PAGE 7 LINE 17-2
2023

# Statement

TO

IN ACCOUNT WITH

| CURRENT | OVER 30 DAYS | OVER 60 DAYS | TOTAL AMOUNT |
|---|---|---|---|
| | | | |

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KUPERMAN RESIDENCE

OTHER MAINTENANCE

| Date | Purpose | Vendor | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | | |
| **2024** | | | | | | | | |
| 9/18/24 | 307 tenant debris removal | The Dump Guys | | | | | | $550 |
| 12/31/24 | 305 boiler annual service | Dog House Heating | | | | | | $199 |
| 12/31/24 | Total Home Care Maintenance Plan | Dog House Heating | | | | | | $249 |
| | | | | | | | | --- |
| | | | | | | | | $998 |
| | | | | | | | | |
| | | | | | | | | |
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| | | | | | | | | |
| | | | | | | | | |
| | | | --- | --- | --- | --- | --- | --- |
| | | **TOTAL:** | | | | | | |



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2024

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Pg. 7 line 17-4

2024

Dog House
33 Bath Road, Brunswick, ME 04011 United States
(207) 865-0989
www.calldoghouse.com

Estimate 40107348
Job 34372163
Estimate Date 12/31/2024
Customer PO

**Billing Address**
Anna Kuperman Rental1
305 Deering Avenue
Portland, ME 04103 USA

**Job Address**
Anna Kuperman Rental1
305 Deering Avenue
Portland, ME 04103 USA

**Estimate Details**

Thcc 3

| Service # | Description | Quantity | Your Price | Your Total |
|---|---|---|---|---|
| THCC-NEW | New T.H.C.C. membership, effective /2024 - /2025. Enjoy the benefits of being a Total Home Care Club member, including:<br><br>~ Free consultations to assess any repair needs for the duration of your membership. Using the THHC saves you $99 for each diagnostic occurrence.<br><br>~ 10%-member discount rate. This discount is for replacement parts and repair services.<br><br>~ Fast, free financing, through EnergyPlus Home Improvement Financing from NEIF.<br><br>~ Live technical assistance.<br><br>~ One Annual Maintenance Appointment (up to $199 value).<br><br>~ One Annual Plumbing Inspection appointment (up to $308 value). Our team is happy to have the opportunity to provide you with peace of mind for all of your HVAC & Plumbing needs! | 1.00 | $249.00 | $249.00 |

| | |
|---|---|
| **Sub-Total** | $249.00 |
| **Tax** | $0.00 |
| **Total** | $249.00 |

Thank you for choosing Dog House!

THIS IS AN ESTIMATE, NOT A CONTRACT FOR SERVICES. The summary above is furnished by Dog House as a good faith estimate of work to be performed at the location described above and is based on our evaluation and does not include material price increases or additional labor and materials which may be required should unforeseen problems arise after the work has started. I understand that the final cost of the work may differ from the estimate, perhaps materially. THIS IS NOT A GUARANTEE OF THE FINAL PRICE OF WORK TO BE PERFORMED. I agree and authorize the work as summarized on these estimated terms, and I agree to pay the full amount for all work performed.

*PLEASE NOTE: diagnostic fees are waived if the customer agrees to have repair work completed. If the customer cancels the repair work, the diagnostic fee will be charged.

12/31/2024

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pg. 7 line 17-5

Dog House
33 Bath Road, Brunswick, ME 04011 United States
(207) 865-0989
www.calldoghouse.com

Estimate 40107354
Job 34372163
Estimate Date 12/31/2024
Customer PO

2024

**Billing Address**
Anna Kuperman Rental1
305 Deering Avenue
Portland, ME 04103 USA

**Job Address**
Anna Kuperman Rental1
305 Deering Avenue
Portland, ME 04103 USA

**Estimate Details**

Annual oil maintenance

| Service # | Description | Quantity | Your Price | Your Total |
|---|---|---|---|---|
| ATU-Oil | Our annual tune-up for your furnace includes:<br>~Test pump<br>~Test ignitor<br>~Check electrodes<br>~Test cad cell<br>~Inspect oil tank and line<br>~Inspect chimney<br>~Brush VAC efficiency test<br>~Check chamber and cleanouts<br>~Document code and safety hazards.<br><br>Parts include: 1 nozzle, 1 pump screen, and 1 tank filter (which we will inspect for leaks after it is changed) .<br><br>THIS DOES NOT INCLUDE: Air filter, 2nd tank filter, electrodes, cement, or gaskets or any parts not listed. | 1.00 | $199.00 | $199.00 |

| | |
|---|---|
| **Sub-Total** | $199.00 |
| **Tax** | $0.00 |
| **Total** | $199.00 |

Thank you for choosing Dog House!

THIS IS AN ESTIMATE, NOT A CONTRACT FOR SERVICES. The summary above is furnished by Dog House as a good faith estimate of work to be performed at the location described above and is based on our evaluation and does not include material price increases or additional labor and materials which may be required should unforeseen problems arise after the work has started. I understand that the final cost of the work may differ from the estimate, perhaps materially. THIS IS NOT A GUARANTEE OF THE FINAL PRICE OF WORK TO BE PERFORMED. I agree and authorize the work as summarized on these estimated terms, and I agree to pay the full amount for all work performed.

*PLEASE NOTE: diagnostic fees are waived if the customer agrees to have repair work completed. If the customer cancels the repair work, the diagnostic fee will be charged.

12/31/2024

75

Pg. 7 line 17-6

Gmail

Anna Kuperman <annakuperman@gmail.com>

2024

# Your Recent Order

3 messages

**The Dump Guy** <noreply@appninjas.com> Tue, Sep 17, 2024 at 11:14 AM
Reply-To: The Dump Guy <dumpguyme@gmail.com>
To: Annakuperman@gmail.com

This email was generated when you placed an order with The Dump Guy using a uCharge terminal. Your address has not been added to any list and you will not be emailed twice about this order.

## Your Receipt

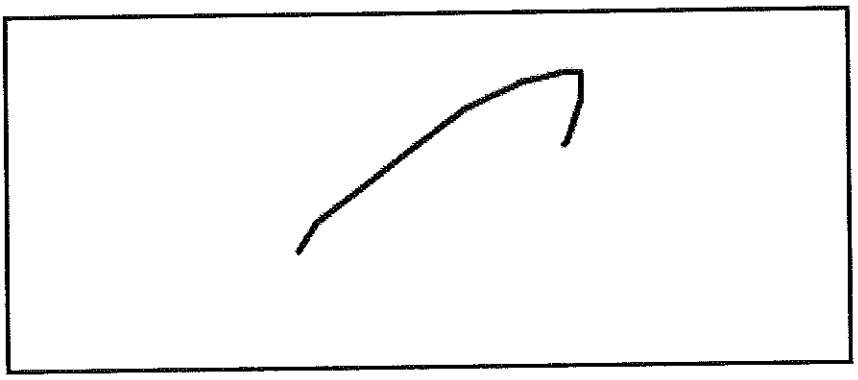
The Dump Guy

### About Your Order

Your Visa ending in 0406 has been **charged in the amount of 550.00 USD**.

| | |
|---|---|
| **Date:** | 9/17/2024 11:14AM |
| **Total:** | 550.00 USD |
| **Card:** | Visa 0406 |
| **Auth Code:** | 02130D |
| **Description:** | 305 Deering Ave Portland - Max |

### Signature



76

Thank you for your business!

pg 7 line 17 - 7
2024

---

**Anna Kuperman** <annakuperman@gmail.com> Tue, Sep 17, 2024 at 6:03 PM
To: The Dump Guy <dumpguyme@gmail.com>

Hi Thanks for the removal today. Cuuld you send me this receipt as an attachment? I cant seem to download it into a pdf to save for my tax files. Thanks!

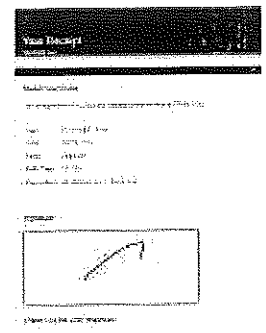
Anna
[Quoted text hidden]

---

**The Dump Guy** <dumpguyme@gmail.com> Wed, Sep 18, 2024 at 9:54 AM
To: Anna Kuperman <annakuperman@gmail.com>

Let me know if this works.

Jack
Dump Guy
[Quoted text hidden]



**Anna Kuperman receipt.png**
27K

77

Gmail

page 7 line 21-1

Anna Kuperman <annakuperman@gmail.com>

2023

# PWD: 305 Deering Avenue

**Customer Help** <CHelp@pwd.org> Thu, Sep 11, 2025 at 10:47 AM
To: "annakuperman@gmail.com" <annakuperman@gmail.com>

Anna,

Have a nice rest of your day!

Melissa

2023:

Portland Water District
FROM SEBAGO LAKE TO CASCO BAY

Customer Service
Office Hours:
8:00 A.M. - 4:30 P.M.

Account 30006733

9/11/2025

ServiceAddress

**Customer Payment Activity for 2023**

| ITEM_CATEGORY | ITEM_DT | ITEM_AMT | Source_Ref | Source_Spec |
|---|---|---|---|---|
| PYMNT | 01/31/2023 | -126.90 | Invoice Cloud | |
| PYMNT | 02/28/2023 | -158.27 | Invoice Cloud | |
| PYMNT | 03/28/2023 | -113.29 | Invoice Cloud | |
| PYMNT | 05/02/2023 | -143.33 | Invoice Cloud | |
| PYMNT | 05/30/2023 | -143.33 | Invoice Cloud | |
| PYMNT | 06/27/2023 | -128.31 | Invoice Cloud | |
| PYMNT | 08/01/2023 | -143.33 | Invoice Cloud | |
| PYMNT | 08/29/2023 | -54.51 | Invoice Cloud | |
| PYMNT | 09/26/2023 | -23.62 | Invoice Cloud | |
| PYMNT | 10/31/2023 | -147.38 | Invoice Cloud | |
| PYMNT | 11/28/2023 | -131.91 | Invoice Cloud | |
| PYMNT | 12/26/2023 | -209.26 | Invoice Cloud | |
| | | -1,523.44 | | |

2024:

page 7 line 21-2
2024

Customer Service
Office Hours:
8:00 A.M. - 4:30 P.M.

Portland Water District
FROM SEBAGO LAKE TO CASCO BAY

Account 30069427

9/11/2025

ANNA KUPERMAN
17 TWELTH ST
PROVIDENCE, RI 02906

ServiceAddress
305 DEERING AVE

**Customer Payment Activity for 2024**

| ITEM_CATEGORY | ITEM_DT | ITEM_AMT | Source_Ref | Source_Spec |
|---|---|---|---|---|
| PYMNT | 09/17/2024 | -290.46 | Invoice Cloud | |
| PYMNT | 10/29/2024 | -103.84 | Invoice Cloud | |
| PYMNT | 11/26/2024 | -119.71 | Invoice Cloud | |
| PYMNT | 12/31/2024 | -214.93 | Invoice Cloud | |
| | | -728.94 | | |

Page 7 line 21 - 3

2024

Portland Water District
FROM SEBAGO LAKE TO CASCO BAY

Customer Service
Office Hours:
8:00 A.M. - 4:30 P.M.

Account 30006733

9/11/2025

ServiceAddress

**Customer Payment Activity for 2024**

| ITEM_CATEGORY | ITEM_DT | ITEM_AMT | Source_Ref | Source_Spec |
|---|---|---|---|---|
| PYMNT | 01/30/2024 | -240.20 | Invoice Cloud | |
| PYMNT | 02/27/2024 | -164.53 | Invoice Cloud | |
| PYMNT | 03/26/2024 | -180.44 | Invoice Cloud | |
| PYMNT | 04/30/2024 | -164.82 | Invoice Cloud | |
| PYMNT | 05/28/2024 | -196.06 | Invoice Cloud | |
| PYMNT | 07/02/2024 | -117.96 | Invoice Cloud | |
| PYMNT | 08/13/2024 | -228.11 | Invoice Cloud | |
| | | -1,292.12 | | |

**CUSTOMER HELP**

Portland Water District Customer Service Department

207-761-8310
CHelp@pwd.org
https://www.pwd.org/

Portland Water District
From Sebago Lake to Casco Bay

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Please consider the environment before printing this email

# CITY OF PORTLAND, ME

munis a tyler erp solution

page 6 line 16

## ACCOUNT HISTORY 708077

AR Category: 00

Form Type: S SUMMARY OF CHARGES/PMTS

| Account # / Location | Customer Name | Date | Type | Chk/ref # | Amount | Interest Due / Parcel Int. Included | Ending Balance | Total Due |
|---|---|---|---|---|---|---|---|---|
| 708077 | 104499KUPERMAN ANNA & | | | | | .00 | .00 | .00 |
| 305 | DEERING AVE | | | PTLD ME | | 117-C-001-001 | | |
| | | 08/21/2025 | Payment | BANK XFER | -69.75 | .00 | .00 | |
| | | 08/01/2025 | Charge | | 69.75 | .00 | 69.75 | |
| | | 05/21/2025 | Payment | BANK XFER | -69.75 | .00 | .00 | |
| | | 05/01/2025 | Charge | | 69.75 | .00 | 69.75 | |
| | | 02/21/2025 | Payment | BANK XFER | -69.75 | .00 | .00 | |
| | | 02/03/2025 | Charge | | 69.75 | .00 | 69.75 | |
| | | 11/21/2024 | Payment | BANK XFER | -69.75 | .00 | .00 | |
| | | 11/01/2024 | Charge | | 69.75 | .00 | 69.75 | |
| | | 08/21/2024 | Payment | BANK XFER | -69.75 | .00 | .00 | |
| | | 08/01/2024 | Charge | | 69.75 | .00 | 69.75 | |
| | | 05/21/2024 | Payment | BANK XFER | -69.75 | .00 | .00 | |
| | | 05/01/2024 | Charge | | 69.75 | .00 | 69.75 | |
| | | 02/21/2024 | Payment | BANK XFER | -69.75 | .00 | .00 | |
| | | 02/01/2024 | Charge | | 69.75 | .00 | 69.75 | |
| | | 11/21/2023 | Payment | BANK XFER | -69.75 | .00 | .00 | |
| | | 11/01/2023 | Charge | | 69.75 | .00 | 69.75 | |
| | | 08/22/2023 | Payment | BANK XFER | -69.75 | .00 | .00 | |
| | | 08/01/2023 | Charge | | 69.75 | .00 | 69.75 | |
| | | 05/23/2023 | Payment | BANK XFER | -67.50 | .00 | .00 | |
| | | 05/01/2023 | Charge | | 67.50 | .00 | 67.50 | |
| | | 02/22/2023 | Payment | BANK XFER | -135.00 | .00 | .00 | |
| | | 02/01/2023 | Charge | | 67.50 | .00 | 135.00 | |
| | | 11/01/2022 | Charge | | 67.50 | .00 | 67.50 | |
| | | 08/23/2022 | Payment | BANK XFER | -67.50 | .00 | .00 | |

Pg. 4 line 22
2023 & 2024

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page 13a [inc]

2023
81-106

Dog House Energy Services
PO Box 405
Freeport, ME 04032

Phone: (207) 865-0989
info@doghouseheating.
www.doghouseheating.

Bill to
**Seth Levy-tenant Anna Kuperman-owner**
305 Deering Ave
Portland ME 04103

Ship to
**Seth Levy-tenant Ann owner**
305 Deering Ave
Portland ME 04103

Work Order #: 4488

Transaction Date: 2/22/2021

Terms: Due Upon Rece

## Invoice I3324

| Item | Description | Quantity | Price |
|---|---|---|---|
| Flat Rate | • New Burnham MST396 tankless coil steam boiler (high efficiency steam system)• Up to 87% efficient• New Beckett oil burner• New mixing valve• New 6" smoke pipe• New mixing valve• New cold water pipes to join into the existing plumbing system• Remove old boiler | 1 | $8,652.00 |

PAID

Subtot

T

To

Paymer

Balance D

Page **1** of **1**

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PB-A line 2-1 ✓

Zoom Drain - New England
3 Eisenhower Dr.
Westbrook, Maine 04092
207-854-6543
www.zoomdrain.com

**BILL TO**
Anna Kuperman
17 12th Street
Providence, RI 02906 USA

| INVOICE | INVOICE DATE |
|---|---|
| 12407 | Jul 02, 2021 |

**JOB ADDRESS**
Amanda Hannan
307 Deering Avenue
Portland, ME 04103 USA

**Terms:** COD
**Completed Date:** 7/2/2021

## DESCRIPTION OF WORK

Arrived on location to perform house trap removal as quoted.
Removed existing house trap and 4x2 wye picking up kitchen branch.
Installed 4" SCH 40 WYE with 4x2 WYE to pick up existing 2" branch.
Adapted 4x4 WYE onto existing 4" cast main sewer.
Incorporated cleanout on top of 4x2 WYE.

Tested operations, checked for leaks, everything flowing properly at this time.

Follow up camera scope found root infiltration. Performed root removal procedure and cut out 99% of root growth within underground clay main.
Camera scope noted break on top of underground clay main at approximately 36'.
Noted city connection at approximately 46'. At this time break within external main sewer is NOT affecting flow.
Recommended pipe burst of entire external main up to house trap removal. Estimate to follow. Noted city connection at depth of approximately 7.3'

Per request, waited to apply finish concrete until re-pipe estimate is received. Back filled using existing materials and laid bed of crushed stone.

| TASK | DESCRIPTION | QTY | PRICE | TOTAL |
|---|---|---|---|---|
| Description of Work | Description of Work: | 1.00 | $0.00 | $0.00 |
| Z INSTALL SALES | INSTALL: HOUSE TRAP REMOVAL | 1.00 | $2,450.00 | $2,450.00 |
| Z INSTALL SALES | INSTALL: REMOVAL OF RAIN LEADERS (4) | 1.00 | $400.00 | $400.00 |

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P.134 line 2-2

| | | | | |
|---|---|---|---|---|
| Z INSTALL SALES | INSTALL: HYDRO-JETTING ROOT REMOVAL SERVICE | 1.00 | $892.00 | $892.00 |

| PAID ON | TYPE | MEMO | AMOUNT |
|---|---|---|---|
| 6/24/2021 | MasterCard | DEPOSIT | $1,871.00 |
| 7/2/2021 | Visa | | $1,871.00 |

| | |
|---|---|
| SUB-TOTAL | $3,742.00 |
| TAX | $0.00 |
| TOTAL DUE | $3,742.00 |
| PAYMENT | $3,742.00 |
| BALANCE DUE | $0.00 |

Thank you for your business!

CUSTOMER AUTHORIZATION

**Signature indicates approval of quoted pricing and acknowledgment of Zoom Drain & Sewer Terms and Conditions**

Sign here JM Date 7/2/2021

CUSTOMER ACKNOWLEDGEMENT

**Signature indicates approval of work performed.**

Sign here JM Date 7/2/2021

I authorize Install 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.

Sign here Phone Date 7/2/2021

p.43a line 2-3

Zoom Drain - New England
3 Eisenhower Dr.
Westbrook, Maine 04092
207-854-6543
www.zoomdrain.com

BILL TO
Anna Kuperman
17 12th Street
Providence, RI 02906 USA

| INVOICE | INVOICE DATE |
|---|---|
| 12388 | Jun 23, 2021 |

JOB ADDRESS
Amanda Hannan
307 Deering Avenue
Portland, ME 04103 USA

**Terms:** COD
**Completed Date:** 6/23/2021

## DESCRIPTION OF WORK

Arrived on location to address clog in main sewer. Upon arrival noted waste water present on basement floor. Located inlet to house-trap. Opened cover and performed hydro-flush procedure with 3/8 hose. Ran hose approximately 10' before blockage was released and basement begun draining down. Possible roots. Previous services found blockage in same location. Unable to access outlet to trap. Recommended house trap removal with possible root removal. Estimate on file has been updated, customer will clean work area and call back to schedule.

$3742 (HOUSE TRAP REMOVAL/DISCONTINUE RAIN LEADERS/ROOT REMOVAL.
Next Thursday or Friday.

Unable to offer warranty until house trap is removed. Tested operations, checked for leaks, everything flowing properly at this time.

| TASK | DESCRIPTION | QTY | PRICE | TOTAL |
|---|---|---|---|---|
| Description of Work | Description of Work:<br>:Arrived on location to address clog in main sewer. Upon arrival noted waste water present on basement floor. Located inlet to house-trap. Opened cover and performed hydro-flush procedure with 3/8 hose. Ran hose approximately 10' before blockage was released and basement begun draining down. Possible roots. Previous services found blockage in same location. Unable to access outlet to trap. Recommended house trap removal with possible root removal. Estimate on file has been updated, customer will clean work area and call back to schedule.<br><br>$3742 (HOUSE TRAP REMOVAL/DISCONTINUE RAIN LEADERS/ROOT REMOVAL.<br>Next Thursday or Friday. | 1.00 | $0.00 | $0.00 |

line 2-4

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pg. 13a

| | | | | |
|---|---|---|---|---|
| | Unable to offer warranty until house trap is removed. Tested operations, checked for leaks, everything flowing properly at this time. | | | |
| Z304 | ZOOM-JET CLEAN 3"-6" MAIN DRAIN- INSIDE CLEANOUT (Up to 250'):<br>POWERFUL JETS OF WATER SCOUR PIPE CLEAN. UP TO 6 MO. WARRANTY | 1.00 | $674.00 | $674.00 |

| PAID ON | TYPE | MEMO | AMOUNT |
|---|---|---|---|
| 6/23/2021 | Visa | | $674.00 |

| | |
|---|---|
| SUB-TOTAL | $674.00 |
| TAX | $0.00 |
| TOTAL DUE | $674.00 |
| PAYMENT | $674.00 |
| BALANCE DUE | $0.00 |

Thank you for your business!

CUSTOMER AUTHORIZATION

**Signature indicates approval to begin work explained for the quoted price of $674.00 and acknowledgment of Zoom Drain & Sewer Terms and Conditions**

Sign here JM Date 6/23/2021

CUSTOMER ACKNOWLEDGEMENT

**Signature indicates approval of work completed and acknowledgment of Zoom Drain & Sewer Terms and Conditions**

Sign here JM Date 6/23/2021

I authorize Service 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.

Sign here Phone Date 6/23/2021

P. 134 Inc 2-5

# CONTRACT TO CLEAN / DIRECTION TO PAY

I/We, Anna Kuperman, authorize Bouchard Cleaning & Restoration, Inc., to enter the property located at 305-307 Deering Ave in Portland, Maine. I/We further authorize Bouchard Cleaning & Restoration, Inc., its agents and employees to begin cleaning and/or repairing damage to said property resulting from an incident which occurred on or about June 24th, 20 21, and more particularly described as follows: Septic back up in basement.

**Self-pay:** $3,500.00 (1750.00 has been payed. Final pay of $1750.00 due upon completion of work). In consideration for the cleaning and repair services rendered by Bouchard Cleaning & Restoration, Inc., its agents and employees, I/We, hereby promise to pay to Bouchard Cleaning & Restoration, Inc. for all costs of cleaning, repair, and/or replacement to said property. AK

Please Initial

**Insurance Claims:**

I/we hereby direct our insurance company to pay the cost of said cleaning, repair, and/or replacement directly to Bouchard Cleaning & Restoration, Inc. _____ I/We acknowledge that insurance may not cover the full costs of services rendered by Bouchard Cleaning & Restoration, Inc., and therefore, acknowledge and agree to pay to Bouchard Cleaning & Restoration, Inc. any sums for cleaning, repair or replacement not covered by insurance, including but not limited to, deductibles and non-covered items. _____

PLEASE READ BEFORE SIGNING

DATE: AK

AK
Customer Signature

AK
Customer (Print Name)

Carl Murdock
Bouchard Cleaning & Restoration, Inc. Signature

Andrew Murdock
Bouchard Cleaning & Restoration, Inc. (Print Name)

DKI

cleaning&restoration,inc.
Doing the Dirty Work for You

P.O. Box 2202
Bangor, ME 04402-2202
Phone (207) 947-4454
(800) 479-6676
Fax (207) 262-4080

https://mail.google.com/mail/u/1/#search/bouchard/FMfcgzGkZGdGbKWdzmTTDdqGhCfBNxGg?projector=1&messagePartId=0.1

p.134 line 3

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# Invoice

Superior Roofing
525 Riverside St.
Portland, ME 04103
207-702-7663
info@superiorroofingofmaine.com
http://www.superiorroofingofmaine.com

BILL TO
Anna Kuperman
17 12th St
Providence, RI 02906

| INVOICE # | DATE | TOTAL DUE | TERMS | ENCLOSED |
|---|---|---|---|---|
| 22-0821 | 08/15/2022 | $0.00 | Due on receipt | |

SALES REP
JC

JOB LOCATION
305 Deering St

TOWN
Portland

| DESCRIPTION | AMOUNT |
|---|---|
| Cover walls and any plants, decks, and ground with tarps. | 11,400.00 |
| Strip and remove up to two layers of shingles and debris, excluding wood shakes from: All attached to main except all lower roofs and Not doing side of main facing Pitt street | |
| Additional layers require additional charge of $50.00 per sq. | |
| Inspect and clean all roof decking and flashing. Install 6 feet of OC ice and watershield on all eaves. | |
| Install 6 feet of OC ice and watershield in all valleys. Install OC ice and watershield around all roof penetrations. | |
| Replace existing vent pipe boots. | |
| Install deck defense underlayment on remaining exposed roof decking. | |
| Install White 8" heavy gauge aluminum dripedge on all eves and rakes. | |
| Install Owens Corning Starter Strip Plus. | |
| Install 50 year Owens Corning Duration shingles, chosen from book provided. | |
| Install new Pro Edge Caps. | |
| Clean job site on daily basis and remove all job related debris at completion of installation. | |
| All work performed will be compliant with all OSHA Safety Requirements. | |
| Existing leaks/ice dam areas Yes No Location: | |
| Superior Roofing 2 Year Workmanship Warranty. | |
| Additional Information: | |
| Leave metal valleys on dormer if in good shape( guys will inspect once shingles are off) | 1,500.0 |
| 4 Layers of roofing and debris removed from roof. (2 layers were included) | -3,800.0 |
| Down payment | 9,100.0 |
| PAYMENT | |
| BALANCE DUE | **$0.0** |

PAID

p. 13A line 4-1

INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2212-001

Customer: Anna Kuperman
17 12th Street
Providence, RI 02906

Date of this invoice: 4 June 2022

Job name: KUPERMAN

**Work completed:** Shower replacement

| | |
|---|---|
| **30% of Contract price per 6/4/22 Letter of Agreement** | $2,950.80 |
| Total: | $2,950.80 |
| **BALANCE DUE:** | **$2,950.80** |

Rec'd Full
12/31/22

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P/L&A line 4-2

INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Customer: Anna Kuperman
17 12th Street
Providence, RI 02906

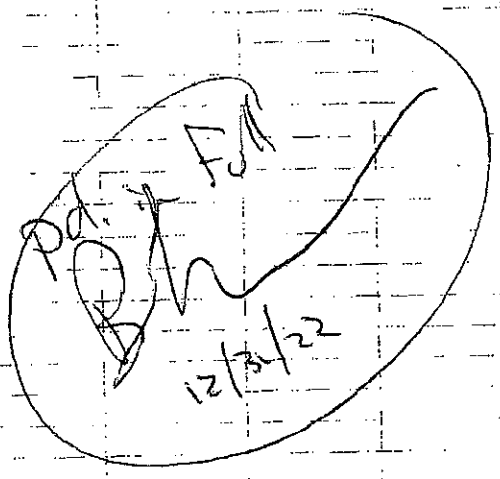
Invoice #2212-002

Date of this invoice: 11 June 2022

Job name: KUPERMAN

**Work completed:** Shower replacement

**Second 30% of Contract price per 6/4/22 Letter of Agreement** $2,950.80




Total: $2,950.80

**BALANCE DUE:** $2,950.80

p.14 line 4-3

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

| | | |
|---|---|---|
| Customer: | Anna Kuperman<br>17 12th Street<br>Providence, RI 02906 | Invoice #2212-003 |
| Date of this invoice: | 22 June 2022 | |
| Job name: | KUPERMAN | |

| | | | | | | |
|---|---|---|---|---|---|---|
| **Work completed:** | Shower replacement | | | | | |
| **Final 40% of Contract price per 6/4/22 Letter of Agreement** | | | | | | $3,934.40 |
| **Change order #1:** | Replace shower supply valves | | | | | |
| Labor | | | | | | |
| Heartwood labor | 6/2/2022 | 1.5 | hrs. @ | $50.00 | /hr. | $75.00 |
| Materials | | | | | | |
| Home Depot | 6/2/2022 | | | | | $53.25 |
| | | | | | Sub-total: | $128.25 |
| **Change order #2:** | Repair floor under tub | | | | | |
| Labor | | | | | | |
| Heartwood labor | 6/2/22-6/6/22 | 6.5 | hrs. @ | $50.00 | /hr. | $325.00 |
| Materials | | | | | | |
| Home Depot | | | | | | $52.28 |
| Lowes | 6/3/2022 | | | | | $33.80 |
| | | | | | Sub-total: | $411.08 |
| **Change order #3:** | Repair back door strike | | | | | |
| Labor | | | | | | |
| Heartwood labor | 6/21/2022 | 0.5 | hrs. @ | $50.00 | /hr. | $25.00 |
| | | | | | Sub-total: | $25.00 |
| | | | | | Sub-total of change orders: | $564.33 |
| | | | | | Builder's fee (15% of change order materials) | $20.90 |
| | | | | | Total of change orders: | $585.23 |
| | | | | | **INVOICE BALANCE** | $4,519.63 |

Rec'd in full
12/31/22

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p. 117 line 5-1

page 13A line 5-1

INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2212-005

| | |
|---|---|
| Customer: | Anna Kuperman<br>17 12th Street<br>Providence, RI 02906 |
| Date of this invoice: | 30 August 2022 |
| Job name: | KUPERMAN |

| | | |
|---|---|---|
| **Work completed:** | Project #1: cooktop replacement | |
| **Contract price:** | 40% of contract amount $2,899.00 complete | $1,159.60 |
| | **INVOICE BALANCE:** | **$1,159.60** |

P.13A line 5-2

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Customer: Anna Kuperman
17 12th Street
Providence, RI 02906

Invoice #2212-006

Date of this invoice: 30 October 2022

Job name: KUPERMAN

| | | | | | | |
|---|---|---|---|---|---|---|
| **Work completed:** | Project #1: cooktop replacement | | | | | |
| **Contract price:** | 50% of contract amount $2,899.00 complete | | | | | $1,449.50 |
| **Work completed:** | Project #2: Kitchen light project | | | | | |
| **Labor** | | | | | | |
| Heartwood labor | 10/3-10/27/22 | 3.5 | hrs. @ | $50.00 | /hr. | $175.00 |
| **Work completed:** | Project #3: Basement light project | | | | | |
| **Contract price:** | 25% of contract amount $738.00 complete | | | | | $184.50 |
| **Work completed:** | Project #6: Repointing brick landing | | | | | |
| **Contract price:** | 25% of contract amount $932.00 complete | | | | | $233.00 |
| | | | | | **INVOICE BALANCE:** | **$2,042.00** |

P.15A line 5-3

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2212-007

Customer: Anna Kuperman
17 12th Street
Providence, RI 02906

Date of this invoice: 13 November 2022

Job name: KUPERMAN

| | | | | | | |
|---|---|---|---|---|---|---|
| **Work completed:** | Project #1: cooktop replacement | | | | | |
| *Contract price:* | Final 10% of contract amount $2,899.00 complete | | | | | $289.90 |
| **Work completed:** | Project #3: Basement light project | | | | | |
| *Contract price:* | Final 75% of contract amount $738.00 complete | | | | | $553.50 |
| **Work completed:** | Project #4: Kitchen vent hood project | | | | | |
| *Contract price:* | 100% of contract amount $661.00 complete | | | | | $661.00 |
| **Work completed:** | Project #5: Storm door replacement project | | | | | |
| *Contract price:* | 100% of contract amount $762.00 complete | | | | | $762.00 |
| **Work completed:** | Project #6: Repointing brick landing | | | | | |
| *Contract price:* | Final 75% of contract amount $932.00 complete | | | | | $699.00 |
| **Work completed:** | Change order cost-plus tasks: kitchen sink faucet/porch ceil lt/ext motion detector lt | | | | | |
| **Labor** | | | | | | |
| Heartwood labor | 9/20/22-11/4/22 | 7.25 | hrs. @ | $50.00 | /hr. | $362.50 |
| **Materials** | | | | | | |
| Home Depot | 10/27/22-11/11/22 | | | | | $263.57 |
| | | | | | Sub-total for change order work: | $626.07 |
| | | | | | Builder's fee: 15% of c/o materials: | $39.54 |
| | | | | | Sub-total for change order work: | $665.61 |
| | | | | | **INVOICE BALANCE:** | **$3,631.01** |

p.134 line 6-1

94

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Customer: Anna Kuperman
17 12th Street
Providence, RI 02906

Invoice #2212-006

Date of this invoice: 30 October 2022

Job name: KUPERMAN

| | | | | | | |
|---|---|---|---|---|---|---|
| **Work completed:** | Project #1: cooktop replacement | | | | | |
| **Contract price:** | 50% of contract amount $2,899.00 complete | | | | | $1,449.50 |
| **Work completed:** | Project #2: Kitchen light project | | | | | |
| **Labor** | | | | | | |
| Heartwood labor | 10/3-10/27/22 | 3.5 | hrs. @ | $50.00 | /hr. | $175.00 |
| **Work completed:** | Project #3: Basement light project | | | | | |
| **Contract price:** | 25% of contract amount $738.00 complete | | | | | $184.50 |
| **Work completed:** | Project #6: Repointing brick landing | | | | | |
| **Contract price:** | 25% of contract amount $932.00 complete | | | | | $233.00 |
| | | | | | **INVOICE BALANCE:** | **$2,042.00** |

p. 1 line 6-2
p 13 A

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2212-007

Customer: Anna Kuperman
17 12th Street
Providence, RI 02906

Date of this invoice: 13 November 2022

Job name: KUPERMAN

| | | | | | |
|---|---|---|---|---|---|
| **Work completed:** | Project #1: cooktop replacement | | | | |
| *Contract price:* | Final 10% of contract amount $2,899.00 complete | | | | $289.90 |
| **Work completed:** | Project #3: Basement light project | | | | |
| *Contract price:* | Final 75% of contract amount $738.00 complete | | | | $553.50 |
| **Work completed:** | Project #4: Kitchen vent hood project | | | | |
| *Contract price:* | 100% of contract amount $661.00 complete | | | | $661.00 |
| **Work completed:** | Project #5: Storm door replacement project | | | | |
| *Contract price:* | 100% of contract amount $762.00 complete | | | | $762.00 |
| **Work completed:** | Project #6: Repointing brick landing | | | | |
| *Contract price:* | Final 75% of contract amount $932.00 complete | | | | $699.00 |
| **Work completed:** | Change order cost-plus tasks: kitchen sink faucet/porch ceil lt/ext motion detector lt | | | | |
| **Labor** | | | | | |
| Heartwood labor | 9/20/22-11/4/22 | 7.25 | hrs. @ | $50.00 /hr. | $362.50 |
| **Materials** | | | | | |
| Home Depot | 10/27/22-11/11/22 | | | | $263.57 |
| | | | | Sub-total for change order work: | $626.07 |
| | | | | Builder's fee: 15% of c/o materials: | $39.54 |
| | | | | Sub-total for change order work: | $665.61 |
| | | | | **INVOICE BALANCE:** | $3,631.01 |

P. 134 line 7-1

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Customer: Anna Kuperman
17 12th Street
Providence, RI 02906

Invoice #2212-006

Date of this invoice: 30 October 2022

Job name: KUPERMAN

| | | | | | | |
|---|---|---|---|---|---|---|
| **Work completed:** | Project #1: cooktop replacement | | | | | |
| **Contract price:** | 50% of contract amount $2,899.00 complete | | | | | $1,449.50 |
| **Work completed:** | Project #2: Kitchen light project | | | | | |
| **Labor** | | | | | | |
| Heartwood labor | 10/3-10/27/22 | 3.5 | hrs. @ | $50.00 | /hr. | $175.00 |
| **Work completed:** | Project #3: Basement light project | | | | | |
| **Contract price:** | 25% of contract amount $738.00 complete | | | | | $184.50 |
| **Work completed:** | Project #6: Repointing brick landing | | | | | |
| **Contract price:** | 25% of contract amount $932.00 complete | | | | | $233.00 |
| | | | | | **INVOICE BALANCE:** | **$2,042.00** |

p.1 line 7-2

p. 13A line 7-2

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Customer: Anna Kuperman
17 12th Street
Providence, RI 02906

Invoice #2212-007

Date of this invoice: 13 November 2022

Job name: KUPERMAN

| | | | | | |
|---|---|---|---|---|---|
| **Work completed:** | Project #1: cooktop replacement | | | | |
| *Contract price:* | Final 10% of contract amount $2,899.00 complete | | | | $289.90 |
| **Work completed:** | Project #3: Basement light project | | | | |
| *Contract price:* | Final 75% of contract amount $738.00 complete | | | | $553.50 |
| **Work completed:** | Project #4: Kitchen vent hood project | | | | |
| *Contract price:* | 100% of contract amount $661.00 complete | | | | $661.00 |
| **Work completed:** | Project #5: Storm door replacement project | | | | |
| *Contract price:* | 100% of contract amount $762.00 complete | | | | $762.00 |
| **Work completed:** | Project #6: Repointing brick landing | | | | |
| *Contract price:* | Final 75% of contract amount $932.00 complete | | | | $699.00 |
| **Work completed:** | Change order cost-plus tasks: kitchen sink faucet/porch ceil lt/ext motion detector lt | | | | |
| **Labor** | | | | | |
| Heartwood labor | 9/20/22-11/4/22 | 7.25 | hrs. @ | $50.00 /hr. | $362.50 |
| **Materials** | | | | | |
| Home Depot | 10/27/22-11/11/22 | | | | $263.57 |
| | | | | Sub-total for change order work: | $626.07 |
| | | | | Builder's fee: 15% of c/o materials: | $39.54 |
| | | | | Sub-total for change order work: | $665.61 |
| | | | | **INVOICE BALANCE:** | **$3,631.01** |

p. [illegible] line 8

p. 13A line 8

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2212-007

Customer: Anna Kuperman
17 12th Street
Providence, RI 02906

Date of this invoice: 13 November 2022

Job name: KUPERMAN

| | | | | | | |
|---|---|---|---|---|---|---|
| **Work completed:** | Project #1: cooktop replacement | | | | | $289.90 |
| *Contract price:* | Final 10% of contract amount $2,899.00 complete | | | | | |
| **Work completed:** | Project #3: Basement light project | | | | | $553.50 |
| *Contract price:* | Final 75% of contract amount $738.00 complete | | | | | |
| **Work completed:** | Project #4: Kitchen vent hood project | | | | | $661.00 |
| *Contract price:* | 100% of contract amount $661.00 complete | | | | | |
| **Work completed:** | Project #5: Storm door replacement project | | | | | $762.00 |
| *Contract price:* | 100% of contract amount $762.00 complete | | | | | |
| **Work completed:** | Project #6: Repointing brick landing | | | | | $699.00 |
| *Contract price:* | Final 75% of contract amount $932.00 complete | | | | | |
| **Work completed:** | Change order cost-plus tasks: kitchen sink faucet/porch ceil lt/ext motion detector lt | | | | | |
| **Labor** | | | | | | |
| Heartwood labor | 9/20/22-11/4/22 | 7.25 | hrs. @ | $50.00 | /hr. | $362.50 |
| **Materials** | | | | | | |
| Home Depot | 10/27/22-11/11/22 | | | | | $263.57 |
| | | | | | Sub-total for change order work: | $626.07 |
| | | | | | Builder's fee: 15% of c/o materials: | $39.54 |
| | | | | | Sub-total for change order work: | $665.61 |
| | | | | | **INVOICE BALANCE:** | **$3,631.01** |

P-13A line 9

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2212-007

Customer: Anna Kuperman
17 12th Street
Providence, RI 02906

Date of this invoice: 13 November 2022

Job name: KUPERMAN

| | | | | | |
|---|---|---|---|---|---|
| **Work completed:** | Project #1: cooktop replacement | | | | |
| *Contract price:* | Final 10% of contract amount $2,899.00 complete | | | | $289.90 |
| **Work completed:** | Project #3: Basement light project | | | | |
| *Contract price:* | Final 75% of contract amount $738.00 complete | | | | $553.50 |
| **Work completed:** | Project #4: Kitchen vent hood project | | | | |
| *Contract price:* | 100% of contract amount $661.00 complete | | | | $661.00 |
| **Work completed:** | Project #5: Storm door replacement project | | | | |
| *Contract price:* | 100% of contract amount $762.00 complete | | | | $762.00 |
| **Work completed:** | Project #6: Repointing brick landing | | | | |
| *Contract price:* | Final 75% of contract amount $932.00 complete | | | | $699.00 |
| **Work completed:** | Change order cost-plus tasks: kitchen sink faucet/porch ceil lt/ext motion detector lt | | | | |
| **Labor** | | | | | |
| Heartwood labor | 9/20/22-11/4/22 | 7.25 hrs. @ | $50.00 /hr. | | $362.50 |
| **Materials** | | | | | |
| Home Depot | 10/27/22-11/11/22 | | | | $263.57 |
| | | | | Sub-total for change order work: | $626.07 |
| | | | | Builder's fee: 15% of c/o materials: | $39.54 |
| | | | | Sub-total for change order work: | $665.61 |
| | | | | **INVOICE BALANCE:** | **$3,631.01** |

p.1 line 10

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p.13A

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2212-007

Customer: Anna Kuperman
17 12th Street
Providence, RI 02906

Date of this invoice: 13 November 2022

Job name: KUPERMAN

| | | | | | | |
|---|---|---|---|---|---|---|
| **Work completed:** | Project #1: cooktop replacement | | | | | |
| *Contract price:* | Final 10% of contract amount $2,899.00 complete | | | | | $289.90 |
| **Work completed:** | Project #3: Basement light project | | | | | |
| *Contract price:* | Final 75% of contract amount $738.00 complete | | | | | $553.50 |
| **Work completed:** | Project #4: Kitchen vent hood project | | | | | |
| *Contract price:* | 100% of contract amount $661.00 complete | | | | | $661.00 |
| **Work completed:** | Project #5: Storm door replacement project | | | | | |
| *Contract price:* | 100% of contract amount $762.00 complete | | | | | $762.00 |
| **Work completed:** | Project #6: Repointing brick landing | | | | | |
| *Contract price:* | Final 75% of contract amount $932.00 complete | | | | | $699.00 |
| **Work completed:** | Change order cost-plus tasks: kitchen sink faucet/porch ceil lt/ext motion detector lt | | | | | |
| **Labor** | | | | | | |
| Heartwood labor | 9/20/22-11/4/22 | 7.25 | hrs. @ | $50.00 | /hr. | $362.50 |
| **Materials** | | | | | | |
| Home Depot | 10/27/22-11/11/22 | | | | | $263.57 |
| | | | | | Sub-total for change order work: | $626.07 |
| | | | | | Builder's fee: 15% of c/o materials: | $39.54 |
| | | | | | Sub-total for change order work: | $665.61 |
| | | | | | **INVOICE BALANCE:** | **$3,631.01** |

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p. 13A line 11-1 ✓

Pine State Services
A Service Experts Company

Why Wait? Call Pine State!

Pine State Services
3 Eisenhower Drive
Westbrook, ME 04092

(207) 883-1200
www.PineStateServices.com

**BILL TO**
Anna Kuperman
305 Deering Avenue
Portland, ME 04103 USA

| INVOICE | INVOICE DATE |
|---|---|
| 165083 | Sep 07, 2023 |

**JOB ADDRESS**
Anna Kuperman
305 Deering Avenue
Portland, ME 04103 USA

**Completed Date:** 9/7/2023
**Payment Term:** Due Upon Receipt
**Due Date:** 9/7/2023

## DESCRIPTION OF WORK

This proposal is to furnish and install (2) new 50 gallon heat pump water heater.
The current boiler feed will be isolated and converted to a heat only application.
This includes the necessary electrical work

Equipment to be installed includes: (2) Bradford White 50 gallon residential heat pump electric 240v water heater
***This includes instant efficiency Maine rebate
Scope of work to include:

- Coordination with homeowners
- Permit
- Removal and disposal of current tank
- Reconnect to existing electrical circuit from panel to new water heater location
- New 120v electrical outlet wired at water heater location for condensate lift pump
- Converting current piping on boiler to be heat only and re-tuning boiler parameters
- Installation of tank and all ancillary parts to add to hot water distribution piping
- Addition of mixing valve on domestic hot output
- Pipe reconfiguration in immediate area at water heaters to separate unit 305&307
- Connecting immediately to current copper hot line for each unit
- New quarter turn ball valve at each water heater cold feed
- T&P will be piped straight down
- New condensate lift pump and piping to nearest sink or laundry standpipe
- Commissioning tank
- Register product with manufacturer
- Review with homeowner
- 1 year warranty through Pine State
- 10 year limited warranty through manufacturer Exclusions:
- No guarantee that this will resolve or prevent boiler issues, but gives it the best chance for longevity and low fuel consumption

Upon signing this agreement 50% down payment required to begin ordering materials and scheduling

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F. line 11-2
13A

Remaining balance due upon completion

This quote is valid for 14 days
Thank you,
Garrett Laws, Project Estimator
Pine State Services
207-730-6408
Garrett.laws@pinestateservices.com

| TASK | DESCRIPTION | QTY | STANDARD PRICE | PRICE | TOTAL |
|---|---|---|---|---|---|
| WHHP-0001 | This proposal is to furnish and install (2) new 50 gallon heat pump water heater.<br>The current boiler feed will be isolated and converted to a heat only application.<br>This includes the necessary electrical work<br><br>Equipment to be installed includes: (2) Bradford White 50 gallon residential heat pump electric 240v water heater<br>***This Includes instant efficiency Maine rebate<br>Scope of work to include:<br><br>• Coordination with homeowners<br>• Permit<br>• Removal and disposal of current tank<br>• Reconnect to existing electrical circuit from panel to new water heater location<br>• New 120v electrical outlet wired at water heater location for condensate lift pump<br>• Converting current piping on boiler to be heat only and re-tuning boiler parameters<br>• Installation of tank and all ancillary parts to add to hot water distribution piping<br>• Addition of mixing valve on domestic hot output<br>• Pipe reconfiguration in immediate area at water heaters to separate unit 305&307<br>• Connecting immediately to current copper hot line for each unit<br>• New quarter turn ball valve at each water heater cold feed<br>• T&P will be piped straight down<br>• New condensate lift pump and piping to nearest sink or laundry standpipe<br>• Commissioning tank<br>• Register product with manufacturer<br>• Review with homeowner<br>• 1 year warranty through Pine State<br>• 10 year limited warranty through manufacturer<br>Exclusions:<br>• No guarantee that this will resolve or prevent boiler issues, but gives it the best chance for longevity and low fuel consumption | 2.00 | $5,000.00 | $4,500.00 | $9,000.00 |

P. Fine line 11-3
13A

Upon signing this agreement 50% down payment
required to begin ordering materials and scheduling
Remaining balance due upon completion

This quote is valid for 14 days
Thank you,
Garrett Laws, Project Estimator
Pine State Services
207-730-6408
Garrett.laws@pinestateservices.com

| | | | | | |
|---|---|---|---|---|---|
| 1YRPC | 1 Year Preferred Customer Club Membership | 1.00 | $0.00 | $0.00 | $0.00 |

-Priority Scheduling
-Emergency Services 24/7
-Discounted Rates
-1 Year Parts & Labor on all Service Repairs
-Discounted Service Fee

| PAID ON | TYPE | MEMO | AMOUNT |
|---|---|---|---|
| 8/31/2023 | Credit Card | | $4,500.00 |
| 9/7/2023 | Credit Card | | $4,500.00 |

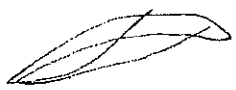
| | |
|---|---|
| MEMBER SAVINGS | $1,000.00 |
| SUB-TOTAL | $9,000.00 |
| TAX | $0.00 |
| TOTAL DUE | $9,000.00 |
| PAYMENT | $9,000.00 |
| BALANCE DUE | $0.00 |

Thank you for using Pine State Services! We value your feedback. Please don't hesitate to contact us if your installation project wasn't exemplary.

CUSTOMER AUTHORIZATION

Technician Signature:

I believe integrity and quality craftsmanship still count and that you, the customer, are our most important asset. If I've done a good job and you are pleased with our company, please let a friend know. If not, please let me know, I'm proud of my work and my goal is for you to be a lifetime satisfied customer who will recommend and refer our services.

Sign here  Date 9/7/2023

CUSTOMER ACKNOWLEDGEMENT

I hereby acknowledge that Pine State Services performed the authorized amount of $9,000.00 as agreed.
I find the service and materials rendered and installed in connection with the above work mentioned to have been

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Line 12

p. 13A

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2311-001

Customer: Anna Kuperman
17 12th Street
Providence, RI 02906

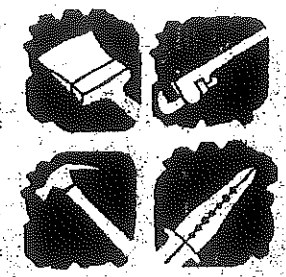
Date of this invoice: 20 September 2023

Job name: KUPERMAN

**Work completed:**
1st fl bathroom fan replacement
DW installation/basement plumbing
Coordinate water heater replacement
Refrigerator repair
Keys/unclog drain/replace den bulbs/repair front door lockset

| | | | | | |
|---|---|---|---|---|---|
| **Labor** | | | | | |
| Heartwood labor | 8/25/23-9/4/23 | 31.25 | hrs. @ | $55.00 /hr. | $1,718.75 |
| **Materials** | | | | | |
| Appliance Doctor | 9/4/23 | | | | $305.00 |
| Downeast Appliance | 8/22/23 | | | | $790.20 |
| Home Depot | 8/22/23-8/31/23 | | | | $273.09 |
| Maine Hardware | 8/26/23 | | | | $15.77 |
| Riverside Recycling | 8/26/23 | | | | $14.00 |
| | | | | Sub-total: | $3,116.81 |
| | | | | Builder's fee: 15% of materials: | $161.86 |
| | | | | Total: | $3,278.67 |
| | | | | **BALANCE DUE:** | **$3,278.67** |

P-3A Line 14



**AFAB**
Anything For A Buck
Professional Services
Gorham, Maine
207 329-4884
ericnevers@yahoo.com
Eric S Nevers

| | Initials | Date |
|---|---|---|
| Prepared By | | |
| Approved By | | |

10-10-23

ANNA KUPERMAN
Deering Ave
Portland, Me

| | | |
|---|---|---|
| Simple Decrotums | | |
| 6 @ $60.00 | | 360.00 |
| Labor | | |
| 5 @ $35.00 | | 175.00 |
| | | $535.00 |

CC: Joel Turgo

106

THANK YOU FOR SHOPPING AT
MAINE HARDWARE
(207) 773-5604

60DAY RETURN POLICY WITH RECEIPT

09/23/23 9:40AM TC 562 SALE

41120 1 EA $11.99 EA
HOSE UTILITY 5 $11.99
3935129 1 EA $5.99 EA
LED S11 E26 SW 7.5W $5.99
4000909 1 EA $329.99 EA
DEHUMIDIFIER 50PT $329.99

SUB-TOTAL:$ 347.97 TAX: $ 19.14
TOTAL: $ 367.11
BC AMT: $ 367.11

BK CARD#: XXXXXXXXXXXX0406
MID:********3880 TID:***3484
AUTH: 09339D AMT: $ 367.11
Host reference #:492184 Bat#

Authorizing Network: VISA

Chip Read EXPR: XXXX
CARD TYPE:VISA
AID : A0000000031010
TVR : 0080008000
IAD : 0602120360A002
TSI : E800
ARC : 00
MODE : Issuer
CVM :
Name : CHASE VISA
ATC :006F
AC : C83EEB435FF516F0
TxnID/ValCode: 044905

Bank card USD$ 367.11

==>> JRNL# E92184
CUST NO:*5

THANK YOU ANNA KUPERMAN
FOR YOUR PATRONAGE

Acct: CASH CUSTOMER

Customer Copy

**********
THANK YOU FOR THINKING OF MAINE HARDWARE
**********

Find Us, Like Us, on Facebook.

PAGE 13 a LINE 13

THANK YOU FOR SHOPPING AT
MAINE HARDWARE
(207) 773-5604

60DAY RETURN POLICY WITH RECEIPT

09/23/23 2:58PM LJ 565 SALE

3369477 1 EA $7.99 EA
TAPCUBE HD GRND ORG BULK $7.99
32202 1 EA $11.99 EA
POWERCNTR 14/3 SJT 3 $11.99
4000904 2 EA $239.99 EA
DEHUMIDIFIER SILVER 22PT $479.98
9161944 1 EA .20 EA
PEPPRMNT PATTE DRK CHOCO $.20

R 8-22-2-20

SUB-TOTAL:$ 500.16 TAX: $ 27.51
TOTAL: $ 527.67
BC AMT: $ 527.67

BK CARD#: XXXXXXXXXXXX0406
MID:********3880 TID:***3484
AUTH: 03361D AMT: $ 527.67
Host reference #:492474 Bat#

Authorizing Network: VISA

Chip Read EXPR: XXXX
CARD TYPE:VISA
AID : A0000000031010
TVR : 0080008000
IAD : 0602120360A002
TSI : E800
ARC : 00
MODE : Issuer
CVM :
Name : CHASE VISA
ATC :0076
AC : 9CCF07B0B6536644
TxnID/ValCode: 045133

Bank card USD$ 527.67

==>> JRNL# E92474
CUST NO:*5

THANK YOU ANNA KUPERMAN
FOR YOUR PATRONAGE

Acct: CASH CUSTOMER

Customer Copy

**********
THANK YOU FOR THINKING OF MAINE HARDWARE
**********

Find Us, Like Us, on Facebook.

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page 14 A line 1 & 2

2024

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Customer: | Anna Kuperman | | | | | | | Invoice #2402-001 |
| | 17 12th Street | | | | | | | |
| | Providence, RI 02906 | | | | | | | |
| Date of this invoice: | 15 February 2024 | | | | | | | |
| Job name: | KUPERMAN | | | | | | | |
| **Work completed:** | Electrical outlet repair & replacement | | | | | | | |
| | Bathroom GFCI + light switch | | | | | | | |
| | Adjust doors | | | | | | | |
| | Laundry area washer box install + misc repairs | | | | | | | |
| | Radiator enclosure repair | | | | | | | |
| | Storm door installation | | | | | | | |
| | Garage lighting projects | | | | | | | |
| | Front door lockset replacement | | | | | | | |
| **Labor** | | | | | | | | |
| Heartwood labor | 1/1/24-2/15/24 | | 43.5 | hrs. @ | $55.00 | /hr. | | $2,392.50 |
| **Materials** | | | | | | | | |
| Home Depot | | | | | | | | $256.68 |
| Home Depot | Storm door | | | | | | | $262.70 |
| Home Depot | Plumbing parts basement laundry | | | | | | | $524.41 |
| Maine Hardware | | | | | | | | $207.88 |
| | | | | | | | | --- |
| | | | | | | | Sub-total: | $3,644.17 |
| | | | | | | Builder's fee: 15% of materials: | | $187.75 |
| | | | | | | | | --- |
| | | | | | | | Total: | $3,831.92 |
| | | | | | | | | |
| | | | | | | | **BALANCE DUE:** | **$3,831.92** |

page 14 A line 3

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2402-002

| | |
|---|---|
| Customer: | Anna Kuperman<br>17 12th Street<br>Providence, RI 02906 |
| Date of this invoice: | 1 March 2024 |
| Job name: | KUPERMAN |

| | |
|---|---|
| **Work completed:** | 2nd fl bedroom window replacement |
| **Fixed price contract per 11/21/23 email proposal** | $1,968.00 |
| **BALANCE DUE:** | **$1,968.00** |

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page 14 A line 4-1

2024

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2402-006

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Customer: | Anna Kuperman<br>17 12th Street<br>Providence, RI 02906 | | | | | | |
| Date of this invoice: | 15 September 2024 | | | | | | |
| Job name: | KUPERMAN | | | | | | |
| **Work completed:** | 307 Deering Electrical code remedies | | | | | | |
| **Labor** | | | | | | | |
| Heartwood labor | 9/1/24-9/15/24 | 19 | hrs. @ | $55.00 | /hr. | | $1,045.00 |
| **Materials** | | | | | | | |
| Home Depot | 9/1/24-9/15/24 | | | | | | $1,738.04 |
| | | | | | | Sub-total: | $2,783.04 |
| | | | | | | Builder's fee: 15% of materials: | $260.71 |
| | | | | | | Total: | $3,043.75 |
| | | | | | | **BALANCE DUE:** | **$3,043.75** |

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page 14 A line 4-2

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2402-007

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Customer: | Anna Kuperman<br>17 12th Street<br>Providence, RI 02906 | | | | | | |
| Date of this invoice: | 20 September 2024 | | | | | | |
| Job name: | KUPERMAN | | | | | | |
| **Work completed:** | 307 Deering Electrical code remedies | | | | | | |
| **Labor** | | | | | | | |
| Heartwood labor | 9/16/24-9/19/24 | 97.75 | hrs. @ | $55.00 | /hr. | | $5,376.25 |
| **Materials** | | | | | | | |
| Home Depot | 9/16/24-9/19/24 | | | | | | $301.96 |
| Lowes | 9/17/2024 | | | | | | $204.29 |
| Maine Hardware | 9/17/2024 | | | | | | $21.09 |
| | | | | | | Sub-total: | $5,903.59 |
| | | | | | | Builder's fee: 15% of materials: | $79.10 |
| | | | | | | Total: | $5,982.69 |
| | | | | | | **BALANCE DUE:** | **$5,982.69** |

page 14 A line 4-3

2024

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2402-008

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Customer: | Anna Kuperman<br>17 12th Street<br>Providence, RI 02906 | | | | | | |
| Date of this invoice: | 8 October 2024 | | | | | | |
| Job name: | KUPERMAN | | | | | | |
| **Work completed:** | 307 Deering Electrical code remedies | | | | | | |
| **Labor** | | | | | | | |
| Heartwood labor | 9/20/24-10/7/24 | 94.75 | hrs. @ | $55.00 | /hr. | | $5,211.25 |
| **Materials** | | | | | | | |
| Amazon | 10/7/2024 | | | | | | $25.29 |
| Home Depot | 9/20/24-10/7/24 | | | | | | $239.08 |
| Lowes | | | | | | | -$181.38 |
| Maine Hardware | 10/3/2024 | | | | | | $21.10 |
| **Waste Disposal** | | | | | | | $41.25 |
| Riverside Recycling | | | | | | | |
| | | | | | | Sub-total: | $5,356.59 |
| | | | | | | Builder's fee: 15% of materials: | $18.01 |
| | | | | | | Total: | $5,374.60 |
| | | | | | | **BALANCE DUE:** | **$5,374.60** |

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page 14 A line 5-1

2024

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2402-010

| | | | | | | |
|---|---|---|---|---|---|---|
| Customer: | Anna Kuperman<br>17 12th Street<br>Providence, RI 02906 | | | | | |
| Date of this invoice: | 17 November 2024 | | | | | |
| Job name: | KUPERMAN | | | | | |
| **Work completed:** | Kitchen renovation | | | | | |
| **60% of total fixed price amount of $17,202 from 10/8/24 Letter of Agreement** | | | | | | $10,321.20 |
| **Work completed:** | Electrical code remedy projects | | | | | |
| **Labor**<br>Heartwood labor | 10/8/24-11/16/24 | 7.5 | hrs. @ | $55.00 | /hr. | $412.50 |
| **Materials** | | | | | | |
| | | | | | Sub-total: | $412.50 |
| | | | | | Builder's fee: 15% of materials: | $0.00 |
| | | | | | Total: | $412.50 |
| **Work completed:** | Basement plumbing repairs | | | | | |
| **Labor**<br>Heartwood labor | 10/8/24-11/16/24 | 2 | hrs. @ | $55.00 | /hr. | $110.00 |
| **Materials**<br>Home Depot | 10/8/24-11/16/24 | | | | | $66.12 |
| | | | | | Sub-total: | $176.12 |
| | | | | | Builder's fee: 15% of materials: | $9.92 |
| | | | | | Total: | $186.04 |
| | | | | | **BALANCE DUE:** | **$10,919.74** |

page 14 A line 5-2
2024

# INVOICE

HEARTWOOD BUILDERS
66 Colonial Rd.
Westbrook, ME 04092
Tel: 207-266-8018

Invoice #2402-011

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Customer: | Anna Kuperman | | | | | | | |
| | 17 12th Street | | | | | | | |
| | Providence, RI 02906 | | | | | | | |
| Date of this invoice: | 23 December 2024 | | | | | | | |
| Job name: | KUPERMAN | | | | | | | |
| **Work completed:** | Kitchen renovation | | | | | | | |
| **40% of total fixed price amount of $17,202 from 10/8/24 Letter of Agreement (100% now billed to date)** | | | | | | | | $6,880.80 |
| **Work completed:** | Electrical code remedy projects | | | | | | | |
| **Labor** | | | | | | | | |
| Heartwood labor | 11/17-12/23/24 | | 28.75 | hrs. @ | $55.00 | /hr. | | $1,581.25 |
| **Materials** | | | | | | | | |
| Home Depot | 11/17-11/23/24 | | | | | | | $74.80 |
| | | | | | | | Sub-total: | $1,656.05 |
| | | | | | | Builder's fee: 15% of materials: | | $11.22 |
| | | | | | | | Total: | $1,667.27 |
| **Work completed:** | Kitchen change orders | | | | | | | |
| **Labor** | | | | | | | | |
| Heartwood labor | 11/17-12/23/24 | | 6.5 | hrs. @ | $55.00 | /hr. | | $357.50 |
| **Materials** | | | | | | | | |
| Home Depot | 11/17-11/23/24 | | | | | | | $142.65 |
| Home Depot | 11/18/2024 | kitchen sink | | | | | | $125.55 |
| | | | | | | | Sub-total: | $625.70 |
| | | | | | | Builder's fee: 15% of materials: | | $40.23 |
| | | | | | | | Total: | $665.92 |

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page 14 A line 6-i 2024

**From:** **downeastappliance** noreply@syncpos.net
**Subject:** Thank you for your order from Downeast Home Appliance.
**Date:** August 31, 2024 at 12:33 PM
**To:** annakuperman@gmail.com

DOWNEAST HOME APPLIANCE CENTER

## Your order has been received.

**Thanks for shopping with us!**
Your order has been received and has been processed.
The details are shown below for your reference.

**Order ID: 13298** **Order Date: 08-31-2024** **Payment Status: AUTH_CAPTURE**

| Item | Product Code | Price | Quantity | Total Price |
|---|---|---|---|---|
| Whirlpool® 14.3 Cu. Ft. Monochromatic Stainless Steel Top Freezer Refrigerator Model Number: WRT134TFDM Location : Riverside Warehouse | #WRT134TFDM | $849.00 | 1 | $849.0C |
| Delivery -Job deliver new install, nothing to remove, acc thru entrance on Pitt St, Key pad lock #1111, may or may not be someone thereType : 1st Floor Delivery, Delivery Date : 09/13/2024, Time In : 10:00, Time Out : 1:00 | #delivery | - | 1 | - |

**Shipping Address**
Anna Kuperman
305 Deering Ave
Portland, ME 04103

| | |
|---|---|
| **Sub Total** | $849.0C |
| **Tax** | $46.7C |
| **Total Price** | $895.7C |

**Transaction Detail**

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pg.14A line 6-2

| | | |
|---|---|---|
| | Paid by External-MC 7109 ex 11/27 code 02749B | $895.7C |
| Downeast Home Appliance | 207-772-0053 | |

© 2001 - 2024 Downeast Home Appliance All Rights Reserved

page 19 Line 1-1

Page 19 Line 1-1

XVII. Monthly Rent Worksheet written explanation

305: The tenants in 305, Sydney McMillan and Theresa Nguyen moved into the house in October of 2023. I overcharged them in their initial rent. When I got the notice of violation, I came to an agreement with them and have been paying them back for the overcharge. The Notice of Violation (Page 19 Line 1-4) gives the correct number that they can be charged $2356. I am charging $2350 for ease of math.

Based on the Notice of Violation (Page 19 Line 1-4) "FY 2023…maximum amount that a tenant can be charged was $16,497.74." This number includes 7 months of allowable rent that spanned October 2023-May 1 2024. I am dividing this number by 7 in order to get the monthly allowable rent for 2023. $16, 497.74/ 7= $2356.82

Please see supporting evidence labeled Page 19 Line 1-7, 8—email between tenants and me agreeing on new rent and how I will reimburse them. And Page 19 1-9, Amendment to Lease Agreement that changes the rent in the lease to $2350 through October 2024. It is currently at $2400. That includes an allowable 2% annual rent increase. The lease ends at the end July 2025.

307: Based on the 5/1/2024 Notice of Violation and Order to Correct (Page 19 Line 1-6, "FY 2024…The maximum amount of rent that could be charged for the unit is 9713.05." This was for the period of January-May of 2024, so I am dividing by 5, to get $1942 for allowable rent for January 2024-January of 2025.

In July of 2023, previous tenant in 307 had agreed to move out in June 2024. However, she did not. I got a lawyer to work on figuring out how to lessen the amount that I owed her as reimbursement as outlined in the Notice of Violation and Order to Correct. She moved out in August 2024 and I settled with the city to pay her the agreed upon reimbursement minus unpaid rent. Please see Consent Agreement and check (Page 19 Line 1-10, 11, 12, 13).

The new tenant (who is the former tenant from 305!) currently in 307 officially moved in on September 8. He is paying $1942 monthly. I have a screen shot of his 75% rent for September through Venmo and a check for October (Page 19 Line 1-14).

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Page 19 Line 1-2

Page 19 Line 1-1 written explanation
Page 19 Line 1-2 summary of documents
Page 19 Line 1-3,4,5,6 Notice of Violation
Page 19 Line 1-7, 8 email between 305 and me
Page 19 Line 1-9 Amendment to Lease 305
Page 19 Line 1-10, 11,12, 13 Consent Agreement with city and check to former 307 tenant Hannan
Page 19 Line 1-14 September Venmo and October check from current 307 tenant Levy

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

Page 19 Line 1-3

05/01/2024
Case Number: RCC2400012
Business License Number: 20170812

Anna Kuperman
17 12th Street
Providence, RI 02906

## NOTICE OF VIOLATION AND ORDER TO CORRECT

Anna,

The City of Portland Permitting and Inspections Department inspected the rental data for the located at 305-307 Deering Ave on **May 1, 2024** and found violations of the City of Portland Code of Ordinances, which are listed on the attached page(s). You are hereby ordered to correct these violations by **June 1, 2024**. Please be advised that penalties will be applied if the violations are not corrected by that date.

If you do not correct the attached violations by the date given, then this matter will be referred to the City of Portland Corporation Counsel for legal action, and you will be charged $150 for re-inspection per the City's fee schedule. In the event of court action, the City may be entitled to an order to correct the violations, civil penalties in the minimum of $100 per violation per day, costs and fees, and other relief under §1-15 of the City Code and 30-A M.R.S. §4452.

Please respond in writing via email to rentcontrol@portlandmaine.gov or send response by USPS to 389 Congress St, Portland, Maine 04101.

**You have a right to appeal this decision to Superior Court within 30 days of the date of this notice pursuant to Rule 80B of the Maine Rules of Civil Procedure.**

I appreciate your anticipated cooperation, and please contact our office by calling 207-874-8900 if you have any questions.

Thank you,

Adam O'Connor
Rental Registration Inspector

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

page 19 Line 1-4

## NON-COMPLIANCE VIOLATION LIST

| | |
|---|---|
| **APPLICABLE CODE SECTION(S)** | City Code 6-234 |
| **CODE DESCRIPTION** | Landlords may not charge more than base rent plus any allowable increases under Sec. 6-234 |
| **COMMENTS** | Landlords must reduce the rent to within the required amount and reimburse any excess rent collected to any tenants who were overcharged. |
| **RENTAL REIMBURSEMENT** | **UNIT 305**<br><br>The tenant was charged **$2,800** month as rent for the unit from starting in October 2023.<br><br>The tenant has paid rent in the amount of **$19,600** during the course of their lease. The maximum amount that can be charged was **$16,497.74.**<br><br>Resulting in the tenant being overcharged a total of **$3,102.26**.<br><br>The tenant must be made whole by reimbursing the amount overcharged **($3,102.26)**.<br><br>Reimbursement may be issued directly to the tenant via check or as a credit for future rent payments.<br><br>Please work with your tenant to resolve this issue and notify the City when settled.<br><br>You must notify the City by the deadline date below when the matter has been resolved.<br><br>Notification must be made in writing. Send any pertinent documents via USPS or by email to rentcontrol@portlandmaine.gov. |
| **DEADLINE** | 06/01/2024 |

page 19 Line 1

## NON-COMPLIANCE VIOLATION LIST

| | |
|---|---|
| **APPLICABLE CODE SECTION(S)** | City Code 6-234 |
| **CODE DESCRIPTION** | Landlords may not charge more than base rent plus any allowable increases under Sec. 6-234 |
| **COMMENTS** | Landlords must reduce the rent to within the required amount and reimburse any excess rent collected to any tenants who were overcharged. |
| **RENTAL REIMBURSEMENT** | **UNIT 307**<br><br>FY2021:<br>The unit was charged a total of **$21,400** in rent.<br><br>The maximum amount of rent that could be charged for the unit is **$20,400.**<br><br>Resulting in the tenant being overcharged a total of **$1,000** for the year.<br><br>FY2022:<br>The unit was charged a total of **$24,600** in rent.<br><br>The maximum amount of rent that could be charged for the unit is **$21,359.16.**<br><br>Resulting in the tenant being overcharged a total of **$3,240.84** for the year.<br><br>FY2023:<br>The unit was charged a total of **$26,400** in rent.<br><br>The maximum amount of rent that could be charged for the unit is **$22,854.24.**<br><br>Resulting in the tenant being overcharged a total of **$3,545.76** for the year.<br><br>-----Continued on next page---- |

Page 19 Line 1-6

## NON-COMPLIANCE VIOLATION LIST

| | |
|---|---|
| **RENTAL REIMBURSEMENT** | FY2024 (year to date):<br>The unit was charged a total of **$11,220** in rent.<br><br>The maximum amount of rent that could be charged for the unit is **$9,713.05.**<br><br>Resulting in the tenant being overcharged a total of **$1,506.95** for the year.<br><br>Summary of Overcharges:<br>**2021: $ 1,000.00**<br>**2022: $ 3,240.84**<br>**2023: $ 3,545.76**<br>**2024: $ 1,506.95**<br>**Total $ 9,293.55**<br><br>The tenant must be made whole by reimbursing the amount overcharged ($9,293.55).<br><br>Reimbursement may be issued directly to the tenant via check or as a credit for future rent payments.<br><br>Please work with your tenant to resolve this issue and notify the City when settled.<br><br>You must notify the City by the deadline date below when the matter has been resolved.<br><br>Notification must be made in writing. Send any pertinent documents via USPS or by email to rentcontrol@portlandmaine.gov. |
| **DEADLINE** | 06/01/2024 |

 TAKE IT LINE 1-7

Gmail Anna Kuperman <annakuperman@gmail.com>

# amendment to 305 lease

**Sydney McMillen** <sydney.mcmillen@outlook.com> Fri, Jun 7, 2024 at 7:53 AM
To: Anna Kuperman <annakuperman@gmail.com>, Theresa Nguyen <theresanguyent@gmail.com>
Cc: Mkbeade <mkbeade@verizon.net>

Good morning,

Everything looks good to me. I've attached the signed addendum.

Thank you,

Sydney

---

**From:** Anna Kuperman <annakuperman@gmail.com>
**Sent:** Wednesday, June 5, 2024 11:17:50 AM
**To:** Theresa Nguyen <theresanguyent@gmail.com>
**Cc:** Sydney Jessica McMillen <sydney.mcmillen@outlook.com>; Mkbeade <mkbeade@verizon.net>
**Subject:** Re: amendment to 305 lease

No change to water for now. I just spoke to Portland Water District and they had two options. I'm going to call and get estimates, but if/when anything changes, we will talk about it again, agree and then add an amendment.

On Wed, Jun 5, 2024 at 10:05 AM Theresa Nguyen <theresanguyent@gmail.com> wrote:

> Hi Anna,
>
> Thanks for the amendment. We will sign it accordingly. Just want to ensure that the plan for payment of water, if changed from what is originally stated in our lease, to also be reflected on this amendment.
>
> Thanks,
>
> T
>
> On Wed, Jun 5, 2024, 9:56 a.m. Anna Kuperman <annakuperman@gmail.com> wrote:
>> Hi All,
>>
>> I just got a note from the rent control board asking for proof of resolution. I'm hopeful that these emails serve as proof. I also went online and found a template for an amendment to a lease agreement. I signed it and am attaching it here. May it serve as fair proof of our resolution and agreement to move forward without litigation, and in good faith. Could you sign it and send it back to me in the mail or scan and send. Thanks
>>
>> Anna
>>
>> ------- Forwarded message -------
>> From: **Sydney McMillen** <sydney.mcmillen@outlook.com>
>> Date: Sun, May 19, 2024 at 1:58 PM
>> Subject: Re: reimbursement resolution 305
>> To: Anna Kuperman <annakuperman@gmail.com>, Theresa Nguyen <theresanguyent@gmail.com>
>> Cc: Marina <mkbeade@verizon.net>
>>
>> Hi Anna (and Marina),
>>
>> I spoke with Theresa and am responding on behalf of both of us.

 PAGE 19 LINE 1-8

I appreciate you taking the time to come up with a clear, easy to follow plan for rent/reimbursement moving forward. Theresa and I are agreeable to the stairstep approach you've suggested as long as it is all written out like that in the lease and we aren't relying on verbal agreements.

In regards to water, we are willing to pay 305's usage bill. We would also just need a statement included in the lease the we will start paying and continue to pay for water as long as our usage can clearly be tracked (whether through the addition of a separate meter or during an interim period between tenants at 307).

I'm off of work the next few days, so please don't hesitate to text/call me if you'd like to discuss any of this further.

Best,

Sydney (and Theresa)

---

**From:** Anna Kuperman <annakuperman@gmail.com>
**Sent:** Sunday, May 19, 2024 11:22:27 AM
**To:** Sydney Jessica McMillen <sydney.mcmillen@outlook.com>; Theresa Nguyen <theresanguyent@gmail.com>
**Cc:** Marina <mkbeade@verizon.net>
**Subject:** reimbursement resolution 305

Hi Theresa and Sydney,

1. I spoke further with Marina about the appeal to the Superior Court in the case of 305 Deering. According to the violation you are owed $3102.26. Would you consider lowering that number to $3000? Then we could proceed as follows.

Rent $2350 June-September 2024

During these 4 months you pay $2000.

350 x 4 = 1400 towards the reimbursement.

Rent $2400 October 2024-July 2025 (as we talked about on the phone a week or two ago).

You pay $2000 for rent between October 2024-January 2025.

400 x 4 = 1600 towards the reimbursement.

You pay $2400 in rent February 2025-July 2025.

350 x 4 = 1400
400 x 4 = 1600

2. I also want to ask one more time if you'd consider paying your water bill if the 307 side is empty and/or if we install a second meter.

Thanks for your consideration. Let me know what you think.

Anna and Marina
>
>

---

**Lease addendum .pdf**
129K

# 125 AMENDMENT TO LEASE AGREEMENT

PAGE 19
LINE 1-

LANDLORD Anna Kuperman

TENANT Jessica Sydney McMillen and Theresa Nguyen

PROPERTY ADDRESS 305 Deering Ave. Portland ME 04103

This Amendment is made a part of the Residential Lease Agreement (Lease) dated October 1, 2023 between (Landlord's Name) Anna Kuperman, Landlord and (Tenant's Name) Jessica Sydney McMillen and Theresa Nguyen, Tenant(s), for the Leased Premises located at Property Address listed above.

The Lease Agreement will be amended as follows:

Amendment 1

Rent is $2350/monthly June-September 2024

Rent is $2400/monthly October 2024-July 2025

Amendment 2

Tenants pay $2000 June 2024-January 2025
Tenants pay $2400 February 2025-July 2025

$3000 difference in rent owed and rent paid to go towards reimbursement as suggested by Rent Control Board for October 2023-May 2024.

Except as modified by this Amendment, Landlord and Tenant(s) ratify the Lease and agree that the Lease shall remain unchanged and shall continue in full force and effect. In the event of any conflict between the provisions of the Lease and this Amendment, the provisions of this Amendment will control. From the date of signature below, any and all reference to "Lease" and/or "Lease Agreement" shall mean the Lease as modified by this Amendment.

TENANT SIGNATURE [signature] DATE 6/7/24

OWNER SIGNATURE Anna Kuperman DATE 6/1/2024

PAGE 19 LINE 1-20

**Consent Agreement**

The parties, the City of Portland (the "City") and Anna Kuperman ("Landlord") hereby entered into this Consent Agreement as follows:

**Whereas,** Landlord owns certain real property located at 307 Deering Street (the "Property");

**Whereas,** Landlord took ownership of the Property from her parents at the end of July 2022 with co-owner, Marina Kuperman-Beade;

**Whereas,** the Landlord leased the Property to Amanda Hannan ("Tenant") on a long-term basis since taking ownership of the property in July 2022;

**Whereas,** Tenant had formerly rented the Property from Landlord's parents, since about the summer of 2010 until such time as the Property was bequeathed to Landlord and Kuperman-Beade;

**Whereas,** on May 1, 2024, the City issued a Notice of Violation ("NOV") which found that Landlord and her parents overcharged Tenant in violation of Portland's rent control ordinance from January 2021 through April 2024;

**Whereas,** the NOV demanded that the Landlord reimburse the Tenant $9,293.55 to remedy the violation;

**Whereas,** Landlord has appealed the City's NOV and that appeal is currently pending before the Cumberland County Superior Court in Docket No. AP-19-11;

**Whereas,** Tenant paid partial rent in May 2024 and made no payments thereafter, and Tenant's tenancy ended on August 8, 2024;

**Whereas,** Tenant failed to pay rent in the following amounts: May - $1,200.00; June - $1,942.61; July - $1,942.61; August - $501.31 (prorated rent amount for August 1, 2024 - August 8, 2024) for a total of $5,586.53.

**Now, therefore,** in consideration of the foregoing and the covenants and mutual promises and agreements contained in this Agreement, and other valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

1. This Agreement shall be effective when signed by the Parties.

2. Landlord agrees to pay Tenant the amount demanded in the City's NOV, less the amount of unpaid rent for the months of May, June, July and August 2024 as described herein. The Landlord shall pay the Tenant the sum of **Three Thousand, Seven Hundred Seven Dollars and Two Cents ($3,707.02)** within ten (10) days of the effective date of this agreement. In the event the Landlord fails to provide proof of payment to the Tenant within ten (10) days, this Agreement shall be null and void.

3. Once confirmation of payment is received by the City, the City shall deem the

PAGE 19 LINE 1-11

NOV resolved, cease any further enforcement action and waive any other fees or penalties accrued as of the date of this Agreement. The parties further agree to dismiss Landlord's Superior Court appeal by stipulation.

4. This Agreement may be executed in counterparts, each of which shall be an original but which together shall constitute one and the same instrument. Electronic, digital, and copies of signatures shall be considered as valid signatures.

**IN WITNESS WHEREOF,** the Parties set their hands to execute this Agreement as of the dates set forth below.

**SEEN AND AGREED,**

Date: 10-4-2024

CITY OF PORTLAND

Jessica Hanscombe

By: Jessica Hanscombe
Its: Director of Permitting and Inspections

Date: 9/30/24

LANDLORD

Anna Kuperman

PAGE 19 LINE 1-12

COPY

**Jeremy W. Dean**
Attorney at Law

P.O. Box 4391, Portland, Maine 04101 | 207-805-2088 | jwdean@jwdlegal.com

October 4, 2024

Amanda Hannan
98 Island Avenue
Portland, Maine 04108

RE: Payment satisfying City rent control dispute

Dear Amanda,

Please find the enclosed check for $3,707.02 from your former landlord Anna Kuperman. This payment is being made pursuant to Anna's agreement with the City of Portland. Please contact me if you have any questions.

Sincerely,

Jeremy W. Dean
Maine Bar No. 5964

129

PAGE 19 LINE 1-13

ANNA KUPERMAN
17 12TH ST
PROVIDENCE, RI 02906-2924

158
52-60/112
133

Sept. 30, 2024
Date

Pay to the Order of Amanda Hannan $ 3707.02

Three thousand seven hundred seven and 02/100 Dollars

Photo Safe Deposit Details on back

KeyBank National Association
1-800-KEY2YOU® Key.com®

For Rent Control PAYMENT IN FULL SATISFACTION OF ANY & ALL ISSUE W/ CITY OF PROVIDENCE

⑆011200608⑆ 1986134508⑈ 0158

PAGE 19
LINE 1-14

Payment details

# Seth Levy

"September rent"

+ $1,466

## Social activity

♥ 0 💬 0

## Status

Complete

## Transaction details

September 10, 2024, 11:39 PM · Private

## Received from

@SethLevy1964

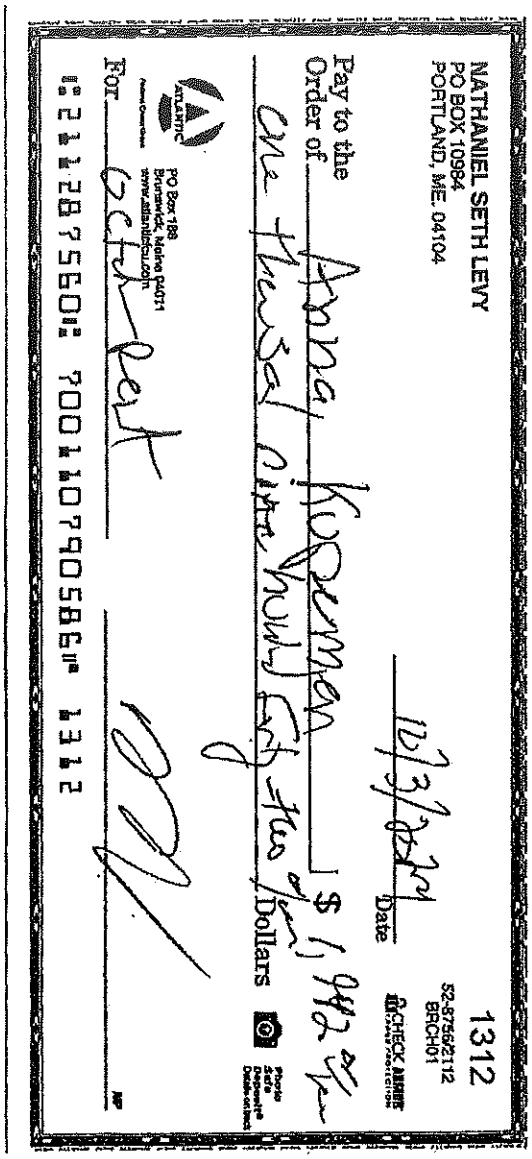
## Type of transaction

Payments between friends

## Transaction ID

4154525135695566740

## Need help?


NATHANIEL SETH LEVY
PO BOX 10984
PORTLAND, ME. 04104

1312
52-8756/2112
BRCH01

Pay to the Order of Anna Kuperman $ 1,942.00

One thousand nine hundred forty-two and 00/100 Dollars

Date 12/3/2021

For October rent

Atlantic
PO Box 188
Brunswick, Maine 04011

⑆211287560⑆ 700110790586⑈ 1312

**N. SETH LEVY**

307 Deering Avenue
Portland, Maine 04103
PH: 207-319-4431; Email: Attorney@SethLevyLaw.com

November 4, 2025

To whom it may concern:

I moved into 307 Deering Ave. September 8, 2024. I was there for three weeks in September and so I paid a prorated amount of $1466 based on a monthly rent amount of $1942. I paid $1942 in October, November and December 2024.

Sincerely,

____/s/_____

N. Seth Levy

# CITY OF PORTLAND
# RENT BOARD
# LANDLORD REQUEST FOR RENT INCREASE DECISION

## 305 DEERING AVENUE

| | |
|---|---|
| DATE APPLICATION SUBMITTED: | October 28, 2024 |
| DATE OF PUBLIC HEARING: | December 18, 2024 |
| LANDLORD/OWNER: | Anna Kuperman and Marina Kuperman-Beade<br>17 12th St<br>Providence, RI 02906 |
| PROPERTY ADDRESS, UNIT, AND CBL: | 305 Deering Avenue<br>CBL 117-B-001-001 |
| TENANTS/INTERESTED PARTIES: | Unit 305: Jessica Sydney McMillen<br>Theresa Nguyen<br>Unit 307: Nathaniel Seth Levy |
| TYPE OF REQUEST: | Fair rate of return (§ 6-234(b)(4)) |
| BASE RENT: | Unit 305: $1,700.00<br>Unit 307: $1,500.00/$1,700.00 |
| CURRENT RENT: | Unit 305: $2,400.00<br>Unit 307: $1,942.00 |
| PROPOSED RENT: | Unit 305: $2,943.00<br>Unit 307: $2,485.00 |

## FINDINGS OF FACT

The City of Portland Rent Board (the "Rent Board" or "Board"), at a meeting of the Board held on December 18, 2024, after reviewing the application materials and supporting documents submitted by Anna Kuperman and Marina Kuperman-Beade (collectively, the "Landlord"), public comments and testimony, and other related information on file, finds the following facts:

1. Section 6-234(b)(4) of the City Code provides that, in addition to certain rent adjustments enumerated in the City Code:

> [U]pon receipt of an application submitted by the Landlord, the Rent Board may approve additional rent increases necessary to ensure a fair return on investment. To calculate what amount is necessary to ensure a fair return on

> investment, the Rent Board shall employ generally acceptable Maintenance of Net Operating Income methodology, and may not consider any valuation-based or capitalization-based methodology or any calculation or methodology factoring market rent or market value of the Covered Unit.
>
> . . .
>
> The Landlord submitting an application for an additional rent increase bears the burden of proof, including the burden of providing all necessary documentation, to demonstrate that the increase is necessary to receive a fair return on investment.

2. Section 6-232 of the City Code defines a "fair return on investment" as "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 of the risks they have assumed, and to achieve minimum constitutionally protected standards," which "must be calculated using Maintenance of Net Operating Income methodology . . . ." Section 6-232 further provides that the Rent Board "may adopt rules or regulations to ensure the fair and consistent application of such methodology." Accordingly, on March 20, 2023, pursuant to the Rent Board's rulemaking authority under Section 6-232 and Section 6-263(i), the Rent Board adopted, and the City Council approved, a Maintenance of Net Operating Income (MNOI) worksheet (*see* City Council Order 155-22/23).[1] Notwithstanding its title, the MNOI worksheet was adopted and functions as a rule of the Rent Board. As such, it is referred to here interchangeably as the "MNOI Worksheet" and the "MNOI Rule."

3. On or about October 28, 2024, the Landlord submitted an application seeking to increase rents, by $543.00 per unit per month, for two covered rental units located at 305 Deering Avenue (the "Property") pursuant to City Code § 6-234(b)(4) due to increased capital expenses and maintenance costs for each of the units. As part of its application, the Landlord completed the MNOI Worksheet and included comprehensive documentation in support of the operating and capital improvement expenses made in base year 2019 and in 2023. The Landlord identified a number of categories of operating expenses in both years but failed to identify or document any license fees or plumbing maintenance costs for the base year.

4. At the Rent Board's December 18, 2024, public hearing and deliberations, Anna Kuperman, testifying for the Landlord, stated that some plumbing maintenance work had been done in 2019 but she did not have any documentation available in support of the Landlord's expenditure. The Rent Board also accepted testimony from the City's housing inspector that the City had in fact imposed licensing fees on covered units in 2019, although the amount of the fees was not evident.

5. The Board finds that, in order to calculate the additional rent increase amounts necessary to ensure a fair rate of return to the Landlord given the lack of supporting documentation for the costs of plumbing maintenance work and licensing fees in the base year, it is necessary and appropriate for the Board to strike the 2023 plumbing maintenance and inspection fee amounts identified by the Landlord in the MNOI Worksheet. When so done, the recalculated allowable per-unit monthly rent increase amounts to $505.00. Accordingly, the Board finds that the Landlord has

[1] On January 6, 2025, the Rent Board adopted and the City Council approved certain amendments to the MNOI worksheet, which are not at issue in this application (*see* City Council Order 108-24/25).

provided sufficient credible evidence demonstrating that a monthly rent increase of $505.00 per unit will ensure a fair return on investment to the Landlord in accordance with Section 6-234(b)(4).

## CONCLUSIONS OF LAW

Based on the foregoing findings of fact, and after consideration of the Landlord's application and presentation, the applicable City Code provisions, the Rent Board's rules, and public testimony, the Rent Board **APPROVES** an additional monthly rent increase of **$505.00** for each of the two units at the Property. The Landlord may only implement this rent increase in accordance with the City Code, state law, and any applicable leases or agreements.

In accordance with Section 6-262 of the City Code, any person aggrieved by this decision may bring an appeal to the Superior Court in accordance with Rule 80B of the Maine Rules of Civil Procedure.

Dated: Wednesday, January 22nd, 2025

Christopher (Buddy) Moore, Chair
City of Portland Rent Board

# Property Manager Summary Sheet – Calendar Year 2024

Property Address: 305 Deering Ave. Portland Maine 04103
Property Manager:Anna Kupermaan
Period Covered: January 1 – December 31, 2024
Management Fee: $5,000 (annual)

## Summary of Duties Performed in 2024

### 1. Tenant Relations and Rent Administration

- Communicated with tenants regarding rent payments, receipts, and lease terms.
- Checked rent receipts monthly, issued late payment reminders as needed.
- Responded to tenant calls, texts, and emails regarding maintenance requests, noise concerns, and other issues.
- Coordinated access for vendors and repair personnel.
- Maintained tenant contact information and correspondence logs.
- Many exchanges between tenant who did not pay rent or leave when scheduled
- Many exchanges with Rent Control Board to figure out how I was out of compliance and how to remedy that.
- Many exchanges with a lawyer to remedy the Rent Control complaint.
- Many hours finding documents from 2019-2023 to create MNOI petition.

### 2. Maintenance and Repairs

- Scheduled and oversaw routine maintenance, including:
    - Plumbing: minor leaks, fixture replacements, drain clearing.
    - Electrical: outlet/switch repairs, lighting fixture updates.
    - Exterior upkeep: paint touch-ups, window caulking
- Communicated with vendors for all work performed.
- Reviewed and approved invoices for payment.
- Relayed and Okayed all work with co-owner of the house.

### 3. Groundskeeping and Seasonal Work

- Arranged for lawn care and landscaping from spring through fall (mowing, trimming, seasonal plantings).
- Scheduled snow removal and sanding during winter months.

### 4. Property Improvements and Renovations

- Planned and coordinated interior updates, including:
    - Kitchen renovation: selected tile, cabinets, countertops, and finishes; obtained quotes and managed contractor schedule with tenant schedule.
    - Electrical updates to meet code and untangle some do it yourself work of my dad.
- Monitored completion timelines and quality control for all projects.
- Discussed budget and vendor performance with co-owner regularly.

### 5. Financial and Administrative Management

- Maintained property receipts for all operational costs.
- Wrote checks for vendors, tracked expenses for reimbursement and tax records.
- Organized year-end summary for accounting and tax filing purposes
- Met with accountant and made copies of all  house expenses for co-owner
- Many hours spent creating an MNOI document with receipts and aid from person serving as accountant..

### 6. Coordination and Oversight

- Communicated with City of Portland staff as needed regarding inspection schedules and compliance questions.
- Met on-site with contractors for project updates.
- Provided progress and budget updates to co-owner.

## Approximate Time Commitment

- Average of 10 hours per month, higher during MNOI season. And also a lot of work figuring out how to deal with a difficult tenant who finally moved out.
- Total estimated annual time: 120–140 hours.

## Annual Compensation Summary

| Description | Amount | Notes |
|---|---|---|
| Property Management Services | $5,000 | Annual management compensation for 2024 |

Gmail **Anna Kuperman <annakuperman@gmail.com>**

# #307 boiler issues

**benfulves@heartwoodbuilders.net** <benfulves@heartwoodbuilders.net> Thu, Feb 29, 2024 at 11:30 AM

To: Anna Kuperman <annakuperman@gmail.com>

Hi,

I received your check (thanks) and your note re: #307 boiler.

The low-water cut-off, which the Dead River technician identified as needing to be replaced, is a very important part of the system. If it isn't working properly it should definitely be replaced. Clearly, the system is working fine at the moment and has been since the technician identified the problem – Oct? – so this doesn't seem to be causing the system to fail.

Here's an explanation of what the low-water cut-off does.

#307, like #305, has a steam boiler. Inside the boiler is a tank that is full of water that is heated and turned to steam, which circulates through the steam pipes and radiators throughout the unit when the temperature at the thermostat falls below whatever it's set at. The steam makes a loop through all the pipes and radiators and then returns to the boiler, usually as water, where it is reheated the next time the thermostat calls for heat. Steam is vented at times from the system, so the water level in the tank drops; the tank automatically refills in order to maintain water in the tank. The low water cut-off is the sensor that senses whether the water in the tank is too low for the boiler to operate safely and opens a valve to refill the tank.

The low-water cut-off works in both directions: it adds water when the tank is low, and it stops adding water so that the tank isn't too full. If the tank gets too full then pressure in the pipes increases. The system is set up to vent this pressure, but if that vent fails it could cause the tank in the boiler, the pipes, or the radiator to crack. I know that the vents in both units are working because I have observed them releasing steam while I've been in the basement.

After inspecting the boiler for #307 on Tuesday, I think the problem with the low-water cut-off is that it's not preventing the tank from overfilling. The tank looks over-full to me now. This is definitely the better of the two problems to have. However, I'll note that when Doghouse came this fall to address the thermostat problem with #305, that technician observed that the new boiler for #305 was also over-filled; he bled water from the system at that time.

A poorly functioning combustion chamber isn't a safety problem; if it fails it merely shuts off the boiler.

The lack of more urgent communication from Dead River is concerning to me, along with the lack of a clear explanation of the problems.

I wish that Dead River had performed their service when I was there so that I could have talked about this with him. At the risk of spending more of your money, I'd like to recommend a two-step process: 1) pay someone else – either Pine State

Services or Doghouse – to evaluate the boiler for #307 WITH ME THERE and 2) obtain pricing from more than one vendor for addressing the problem. This can happen in June when I'm there working in #307.

What did Doghouse charge to replace the boiler for #305?

With regard to oil usage, it looks like both boilers are using oil at the same rate. That speaks well of the efficiency of the boiler for #307. It also tells us that the boiler for #307, whatever its other problems, is not working harder than the boiler for #305.

Thanks,

Ben

Cell: 207-266-8018

Ben Fulves

Heartwood Builders, Inc.

66 Colonial Rd.

Westbrook, ME 04092

Gmail **Anna Kuperman <annakuperman@gmail.com>**

# Electrical projects at 307 Deering

**Anna Kuperman** <annakuperman@gmail.com> Mon, Sep 9, 2024 at 6:33 PM
To: Marina <mkbeade@verizon.net>

Begin forwarded message:

**From:** benfulves@heartwoodbuilders.net
**Date:** September 9, 2024 at 11:24:21 AM EDT
**To:** Anna Kuperman <annakuperman@gmail.com>
**Subject: RE: Electrical projects at 307 Deering**

Will do. I appreciate the prompt response! I'll coordinate with Seth.

Thanks,

Ben

---

**From:** Anna Kuperman <annakuperman@gmail.com>
**Sent:** Monday, September 9, 2024 11:23 AM
**To:** benfulves@heartwoodbuilders.net
**Subject:** Re: Electrical projects at 307 Deering

This all sounds reasonable. Let's do it! Thanks Ben.

On Sep 9, 2024, at 9:57 AM, benfulves@heartwoodbuilders.net wrote:

Hi,

This email addresses the code-required work on the electrical system at 307 Deering.

I've spent some time in the unit and it's clear the most of the existing wiring is knob-and-tube, with some newer wiring in the kitchen and the 1st fl bathroom.

Seth and I have discussed the scheduling of this work, since it will require shutting off most or all of the power in 307 while we're working. He's planning on leaving the house for a week

while we undertake this. At the moment, the dates we have agreed to are 9/14-9/19, and 9/30-10/2.

The code that the City of Portland follows is the National Electrical Code. It requires that all knob-and-tube wiring be removed, that any ungrounded wiring be replaced with grounded, insulated Romex wiring of the correct size for the circuit, and that a sufficient number of outlets be installed in each room (the number is based on a requirement that outlets be no more than twelve feet apart so that a standard six-foot long appliance cord can be plugged into an outlet without the use of an extension cord). Outlets must be located so that an appliance cord not be run across a doorway, which presents a trip hazard. There are other code requirements that pertain to lighting and switching, but these receptacle requirements are in a category by themselves.

The code requirement for hard-wired smoke detectors has been superceded by a rule that allows for wireless-connected smoke detectors. These must be located in each of the sleeping rooms, at the top of stair landings, in the kitchen and above the boilers.

The code also requires that there be two 20 amp GFCI “appliance circuits” in the kitchen, along with dedicated circuits for the refrigerator, dishwasher, and garbage disposal.

Most of the work required involves pulling new Romex wire from the circuit panel up into the receptacle locations on the first floor, and using those access points to pull wire up to the second floor rooms. Making access to reach into walls in order to pull these wires is difficult and time-consuming. It’s a two-person job.

With the schedule that Seth and I have worked out, we have the opportunity for two people to work together for seven days, and for me to work alone for parts of two days. This should be sufficient for us to get most of the required work done, provided we don’t encounter unanticipated obstacles in the walls that prevent running these wires. As part of this work, we will need to cut some holes in some walls and ceilings, particularly in the dining room on the 1st floor. Some work pertaining to the kitchen circuits will need to wait until the cabinet work is done, in order to provide access to the outside wall of the kitchen.

Right now, circuits for 305 and 307 are commingled in the panels. The panels are not labeled clearly to begin with. Re-wiring 307 will enable us to separate some of these circuits so that the panels can be properly segregated.

My estimate for this phase of work is $9,695.  It excludes plaster patching.

Thanks,

Ben

Cell: 207-266-8018

Ben Fulves

Heartwood Builders, Inc.

66 Colonial Rd.

Westbrook, ME 04092

Gmail **Anna Kuperman <annakuperman@gmail.com>**

# Proposal for kitchen renovation

**benfulves@heartwoodbuilders.net** <benfulves@heartwoodbuilders.net> Mon, Sep 9, 2024 at 7:45 PM
To: Anna Kuperman <annakuperman@gmail.com>

Yes, easily done.

---

**From:** Anna Kuperman <annakuperman@gmail.com>
**Sent:** Monday, September 9, 2024 7:29 PM
**To:** benfulves@heartwoodbuilders.net
**Subject:** Re: Proposal for kitchen renovation

With the fridge there is no space for a table. So I say no need for a light fixture there.

Is there a way to put a light up over the sink? Like there is in 305?

> On Sep 9, 2024, at 6:42 PM, benfulves@heartwoodbuilders.net wrote:
>
> I've been assuming that the end of the kitchen in front of the window is where a kitchen table goes. Perhaps with the fridge that's not possible. I'm suggesting a ceiling light in that location. I think the kitchen may be underlit. The awful fluorescent light in the center of the ceiling would have put out a lot of light that is now gone.
>
> Ben
>
> ---
>
> **From:** Anna Kuperman <annakuperman@gmail.com>
> **Sent:** Monday, September 9, 2024 6:38 PM
> **To:** benfulves@heartwoodbuilders.net
> **Cc:** Marina <mkbeade@verizon.net>
> **Subject:** Re: Proposal for kitchen renovation
>
> I'm not sure what you mean by another light over the kitchen table area in this room. Do you mean over the kitchen sink?
>
> I like the plan for extra cabinets and putting the stove straight.

This all sounds good.

On Sep 9, 2024, at 5:15 PM, benfulves@heartwoodbuilders.net wrote:

Hi,

The scope of work we've been discussing is as follows:

1. Replace cabinets
2. Replace ceiling fixture
3. Paint paneling
4. Refinish floor

On site inspection uncovered the following:

1. The water and waste configuration for the kitchen sink is not code compliant. These need to be removed and code-compliant work installed.
    1. The existing system is not vented; this is a code requirement. It will be necessary to open up the wall behind the cabinets to install the vent, which will ultimately exit through the roof of the bathroom addition.
2. Because of the way the cabinets and counters were installed, the countertop cannot be removed and re-used; it must be replaced. (Material cost of a new laminate countertop is about $450)
3. Electrical:
    1. Code requires that the kitchen ceiling light be switched from both entries: the entry at the hall and the entry at the living room. Right now it's only switched from the living room entry. As you know, the light doesn't work.
    2. Two dedicated appliance circuits are required along the countertop, with GFCI outlets. There is one non-compliant outlet on one end of the counter.
    3. Two Romex wires are exposed inside the sink cabinet, stapled to the floor of the cabinet – one for the dishwasher and one for the garbage disposal. There is no code-required disconnect for the disposal – in fact, I was unable to locate a switch for the disposal. All of this is a code violation.

I can obtain from Home Depot good-quality kitchen cabinets for about $325 per cabinet. (There are 9 cabinets in the kitchen at the moment.) I'm not aware of a source of significantly less expensive cabinets.

My revised scope of work for the kitchen is as follows:

1. Replace existing cabinets with new American Westerly-style Maple Rye cabinets with a natural finish, configuration to match existing
    1. Cabinet style and finish: https://woodmarkcabinetry.com/products/materials-and-colors/maple-rye

2. Replace existing countertop with new post-formed laminate countertop with 4” integral backsplash.
3. Re-use existing kitchen sink and faucet.
4. Electrical:
    1. Provide code-compliant wiring for the dishwasher
    2. Provide code-compliant wiring, shut-off and switch for the garbage disposal
    3. Provide two code-compliant appliance outlets above the counter
    4. Provide code-compliant switching of the ceiling lights from the door off the entry hall and the door to the dining room
5. Replace existing flourescent ceiling light with surface-mounted light with code-compliant 3-way switching at entrance and doorway to living room
6. Add a light over the kitchen table area in front of the window
7. Replace existing ceiling tiles with new material
8. Remove existing water supply lines and replace with hot/cold lines fed through the floor, with shut-offs to isolate new valves.
9. Remove existing waste line and replace with code-compliant waste, trap and vent
10. Replace vent hood with new hood vented to the exterior.
11. Refinish the hardwood floor
12. Paint paneling and and trim

My fixed price for this work is $15,934. Of this $3,665 is the material cost of cabinets and counter.

The schedule is controlled by the delivery date of the cabinets.

A note about the floor finishing: the vendor I use charges $2.75 per square foot for any floor area about 400 sf. This would apply to the dining room and living room, not the kitchen because of the extent of work necessary in the kichen. This is a great price! Think about taking advantage of it at some point.

A note about the stove area: The stove can be placed on the wall between he kitchen and the livingroom, and a 12” base cabinet located on either side of the stove so that there is a work surface on either side of the stove. This would enable larger wall cabinets on either side of the vent hood (12” instead of the existing 9” wide cabinets). This would make for a more useful work area.

Thanks,

Ben

Cell: 207-266-8018

Ben Fulves

Heartwood Builders, Inc.

66 Colonial Rd.

Westbrook, ME 04092

Gmail **Anna Kuperman <annakuperman@gmail.com>**

## 305 Deering Ave

**Anna Kuperman** <annakuperman@gmail.com> Mon, Jul 15, 2024 at 11:33 PM
To: Benjamin Grant <grantpropertyservicesme@gmail.com>

And if you see other maples saplings can you take them out too.I?

Thank you!!

> On Jul 15, 2024, at 9:19 PM, Benjamin Grant <grantpropertyservicesme@gmail.com> wrote:
>
> I would suggest removing and planting a lilac or whatever you want to plant there. The maple has taken over and it's killing the lilac. Also I will cut down the driveway hedges.
>
> Best regards,
>
> Benjamin & Samantha Grant
> Grant Property Services
>
> (207) 272-2268
>
> On Mon, Jul 15, 2024 at 1:19 PM Anna Kuperman <annakuperman@gmail.com> wrote:
> > And if you can take the hedges along the driveway down half way. I can't remember if we talked about it.
> >
> > > On Jul 15, 2024, at 8:31 AM, Benjamin Grant <grantpropertyservicesme@gmail.com> wrote:
> > >
> > > That sounds great I'll work on the hedges tomorrow thanks
> > >
> > > On Mon, Jul 15, 2024 at 8:19 AM Anna Kuperman <annakuperman@gmail.com> wrote:
> > > > I'm in Portland today and the grapevine actually look fine for now. And there is a lilac tree! But if you were planning on working on the hedges around the house then sure tomorrow would be fine. Let me know if that was your plan. Thanks!
> > > >
> > > > > On Jul 14, 2024, at 6:27 PM, Benjamin Grant <grantpropertyservicesme@gmail.com> wrote:
> > > > >
> > > > > Hey Anna,
> > > > >
> > > > > My schedule opened up for Tuesday, can I go take care of it then?
> > > > >
> > > > > Best regards,
> > > > >
> > > > > Benjamin & Samantha Grant
> > > > > Grant Property Services
> > > > >
> > > > > (207) 272-2268
> > > > >
> > > > > On Fri, Jul 12, 2024 at 7:05 AM Benjamin Grant <grantpropertyservicesme@gmail.com> wrote:
> > > > > > Will do. I can do it in the next 3-4 weeks and will let you know what day when it gets closer.
> > > > > >
> > > > > > Best regards,
> > > > > >
> > > > > > Benjamin & Samantha Grant
> > > > > > Grant Property Services
> > > > > >
> > > > > > (207) 272-2268
> > > > > >
> > > > > > On Mon, Jul 8, 2024 at 5:16 PM Anna Kuperman <annakuperman@gmail.com> wrote:
> > > > > > > Hi Ben. Can you also keep an eye on the grapevine. Over these next months into September it starts to get very crazy. I don't want it cut all the way back. I want it cut so that there can be grapes and people can enjoy them, but I don't want it to get crazy.
> > > > > > >
> > > > > > > And I don't know if we ever did plant a new lilac tree but I think that's a good idea.
> > > > > > >
> > > > > > > > On Jul 2, 2024, at 6:15 AM, Benjamin Grant <grantpropertyservicesme@gmail.com> wrote:

Hey! Yes I was taking pictures I wanted to be able to send them to you for an update. I'll need to check with a buddy about those hedges. And, Venmo works great.

Best regards,

Benjamin & Samantha Grant
Grant Property Services

(207) 272-2268

On Mon, Jul 1, 2024 at 8:02 PM Anna Kuperman <annakuperman@gmail.com> wrote:

> Last one. Do I pay you by Venmo or do I write a check? I always forget. Thank you!
>
> > On Jul 1, 2024, at 8:00 PM, Anna Kuperman <annakuperman@gmail.com> wrote:
> >
> > That's all good news. Thanks Ben.
> >
> > What should we do about the two hedges that are just too big? What's the answer?
> >
> > > On Jul 1, 2024, at 5:37 PM, Benjamin Grant <grantpropertyservicesme@gmail.com> wrote:
> > >
> > > Hey Anna,
> > >
> > > I was there today and didn't have any issues. Her car wasn't in the drive way but it did look like she was moving things out and making trips all day. There are 2 hedges have gotten too large so I can safely trim them all but I did everything I could.
> > >
> > > Ben
> > >
> > > Best regards,
> > >
> > > Benjamin & Samantha Grant
> > > Grant Property Services
> > >
> > > (207) 272-2268
> > >
> > > On Mon, Jul 1, 2024 at 6:44 AM Anna Kuperman <annakuperman@gmail.com> wrote:
> > >
> > > > Hi Ben,
> > > > Here's my number 401-523-7606. I haven't had any luck getting confirmation that the tenant has moved. If her car is blocking any work you need to do, could you try ringing the bell and asking her to move it? And if she doesn't answer, just work around her? The doorbells are on the Pitt St. Entrance. Her name is Amanda Hannan and her doorbell is 307. If you can give me an update, that'd be great. She was supposed to have moved June 15, when I was in town. Now I'm in Canada til July 8 and it's so confusing how to handle this when I can't get her to respond. Thanks.
> > > >
> > > > > On Jun 27, 2024, at 4:45 PM, Benjamin Grant <grantpropertyservicesme@gmail.com> wrote:
> > > > >
> > > > > Ok, thanks for the heads up. I'll let you know and good luck we've had our share of that
> > > > >
> > > > > Ben
> > > > >
> > > > > On Thu, Jun 27, 2024 at 2:44 PM Anna Kuperman <annakuperman@gmail.com> wrote:
> > > > >
> > > > > > Sounds good! I told the tenants to move their cars out of driveway. I'm having a serious issue with one of the tenants. She is supposed to have moved out by Sunday. But I don't know if she will have moved or not. She parks next to the hedges that should be cut way down. If she's there, lemme know and I'll ask her to move her car. I hope she is not. Thanks ben!
> > > > > >
> > > > > > > On Jun 27, 2024, at 1:23 PM, Benjamin Grant <grantpropertyservicesme@gmail.com> wrote:

Hey I'm going to change it to Monday so I can do it all while I'm there. Likely be there for almost a full day.

Ben

Best regards,

Benjamin & Samantha Grant
Grant Property Services

(207) 272-2268

On Tue, Jun 25, 2024 at 4:13 PM Anna Kuperman <annakuperman@gmail.com> wrote:

> Sounds good! Thank you!! Just lawn and sidewalk grass? Or can you do hedges now too?
>
> > On Jun 25, 2024, at 10:48 AM, Benjamin Grant <grantpropertyservicesme@gmail.com> wrote:
> >
> > Hi Anna,
> >
> > Sorry for the late reply. I can be there Friday if that works.
> >
> > Best regards,
> >
> > Benjamin & Samantha Grant
> > Grant Property Services
> >
> > (207) 272-2268
> >
> > On Sat, Jun 15, 2024 at 10:18 PM Anna Kuperman <annakuperman@gmail.com> wrote:
> >> Hi Ben. I went by the house today and the grass looks pretty unkempt. Could you go by next week and mow the lawn along the sidewalks? If you have time to start working on the hedges next week that would be amazing. Let me know. Thank you !
> >>
> >> Anna

Gmail **Anna Kuperman <annakuperman@gmail.com>**

# Closer?

**Anna Kuperman** <annakuperman@gmail.com> Thu, Aug 8, 2024 at 3:15 PM
To: JWD Legal <jeremy@jwdlegal.com>

Also – – does the city understand that we agreed to a June 1 move out date. Then she said she could do it June 15. Then she said she could do it July 1. Then she blocked me and my sister and told me she didn't receive any of my texts or emails during the time between June 26 to July 15 I think.then she said she would get the rest of her stuff out within the week. Then it's now. So she's been stringing this along for a very long time without giving me the keys that I've been asking for.

> On Aug 8, 2024, at 10:51 AM, JWD Legal <jeremy@jwdlegal.com> wrote:
>
> I'll find out.
>
> On Thu, Aug 8, 2024, 10:44 AM Anna Kuperman <annakuperman@gmail.com> wrote:
> > What lease? I don't have a lease that says anything about $1200. Does the city have that late lease? Has Amanda provided it to somebody because I do not have it.
> >
> > > On Aug 8, 2024, at 10:33 AM, JWD Legal <jeremy@jwdlegal.com> wrote:
> > >
> > > Hi sorry Anna I was scheduled with back to back events yesterday. The conversation was brief but somewhat useful.
> > >
> > > Amy said the concern they had was getting the tenant on board. I explained that I understood that and had tried to work with her but she was generally not responsive and the only conversations you had had with her were regarding her getting her stuff out and cleaning. I said she was still in possession and planning to come back to get more stuff so rent was still accruing. I said the tenant had already been offered almost as much as we were talking about and she had not been willing to discuss settlement and then went no contact. So I didn't think she was going to engage.
> > >
> > > I explained that the case is between the city and the landlord and that the tenant has no rights based on what has happened so far so we do not need her approval.
> > >
> > > The City was concerned that we would reach an agreement and the tenant would have no way of enforcing it. I said that's not true and suggested I could provide a settlement and release agreement that treats the tenant as a third party beneficiary. That would allow her to protect herself should you ever choose to try to sue her for unpaid rent. Amy seemed happy with that so I think that will get the job done at least as to that issue.
> > >
> > > The only thing left was the total amount. She wanted me to try to incorporate the $1200 last months rent Amanda said she paid. It is mentioned in the lease so I think we should do that. And to try to get back to the tenant as much of the unpaid rent from your mother's time as possible.
> > >
> > > Given she is still in possession of the property and telling you she's coming back the rent will knock out almost all of what she is owed and with damages we should be able to reach that amount. I'm going to present the city with a specific agreement and hopefully that will get it done. Meanwhile I emailed Amanda and asked her to please let me know when she has removed all of the belongings and returned the keys. That backs up that she is still in possession.
> > >
> > > My advice is still to just keep facilitating her access until she removed all her stuff and says she's done and returns the keys. She's saving you money because every moment she drags her feet is eliminating whatever damage the city might end up trying to do to you.
> > >
> > > On Wed, Aug 7, 2024, 11:57 AM Anna Kuperman <annakuperman@gmail.com> wrote:
> > > > Update?
> > > >
> > > > > On Aug 6, 2024, at 9:33 PM, Anna Kuperman <annakuperman@gmail.com> wrote:
> > > > >
> > > > > Great news! Can I be part of the call?
> > > > >
> > > > > A couple of small details to remember.
> > > > >
> > > > > Amanda paid $742 in rent for the month of May. She paid it on May 21. The calculations that Adam O'Connor completed for the city and his notice of violation in order to correct assumed that Amanda paid $2244 in May. She did not. His math for 2024 is wrong. He assumed that she had paid full rent in May and she did not. So the number that he provided $1506.95 is incorrect. The correct number for the overcharge for 2024 should be $1205.56. Adam has $1506.95 as his number.
> > > > >
> > > > > January-April 4 months at $2244=$ 8976

Allowable rent for these four months $1942.61 x 4= $7770.44

8976-77770.44= 1205.56

He never actually showed me his calculations and I'm not sure that they are correct for the other years. I wish that I had asked him before we started the appeal process because when I asked him if he could clarify his calculations, he told me now that it had gone to appeal, he could not do that. I have now gone through each year and have exact rent that Amanda paid since 2019 and I could compare that to Adam's calculations to make sure they are correct.

She paid zero rent for June July and August.

She has taken the refrigerator. Various lightbulbs and shades. And as of today has not removed her belongings from basement or garage and some furniture in the backyard. I've asked her repeatedly to please do that. She continues to promise she will and hasn't. She is fucking with me and that is just bad behavior that should not be rewarded with any money.

> On Aug 6, 2024, at 2:41 PM, JWD Legal <jeremy@jwdlegal.com> wrote:
>
> Amy emailed me this morning to set up a call tomorrow morning. I'll update you after I talk to her. Fingers crossed!
>
> On Mon, Aug 5, 2024 at 3:52 PM JWD Legal <jeremy@jwdlegal.com> wrote:
> That won't matter to this case because you have to ask for and receive the rent increases before charging them. We will settle it with the City. I've given them a range of viable options and there is plenty of room to settle.
>
> On Mon, Aug 5, 2024 at 3:07 PM Anna Kuperman <annakuperman@gmail.com> wrote:
> Sigh. I'm just ready to forget this all. But ok. I'm really hopeful you can reach something with the city soon. As I will need that settlement to
> Move forward with asking for a rental increase. I will need something from the city saying that I reimbursed
> Amanda the money that I owed her for 2023 rent and I will need a number that says this is the actual rent she paid given that I reimbursed her. If any of this is unclear, please call and we can talk about it. I think it's pretty clear. It's part of the behemoth worksheet that I have to fill out.
>
> I decided against sending you all the documents showing the work that we've done over the years because it seems like the rent is just accruing. And that there is no need to go this route of appeal. If for some reason, it seems like that argument will be useful with Amy McNally then let me know and I can get receipts to you.
>
> Any more luck with your billing?
>
> > On Aug 5, 2024, at 3:02 PM, JWD Legal <jeremy@jwdlegal.com> wrote:
> >
> > Okay then. So just let her keep playing this game. If you have been clear that you are still waiting for her to vacate the unit, then it's on her to get it done and the rent is still accruing!
> >
> > On Mon, Aug 5, 2024 at 2:42 PM Anna Kuperman <annakuperman@gmail.com> wrote:
> > She has said that she will come back and remove everything from the basement and the garage. But she has not done so. She said she would do it this past weekend. It seems that she does things when she knows that I am arriving for whatever reason.
> >
> > > On Aug 5, 2024, at 2:39 PM, Anna Kuperman <annakuperman@gmail.com> wrote:
> > >
> > > Amanda said she'd be back to get the stuff this weekend. I don't know if she has.
> > >
> > > > On Aug 5, 2024, at 2:16 PM, JWD Legal <jeremy@jwdlegal.com> wrote:
> > > >
> > > > So she didn't actually remove all her stuff if there is still a lot of stuff in the basement,

garage, and outside?

Does she think she has removed it all? Has she explicitly said she is abandoning what remains? Have you asked her what's up with all that stuff?

And did she have the place cleaned?

Has she indicated to you that she is all done or that she's planning to come back?

This will help me analyze whether you can move ahead. But right now it sounds like she's still occupying the space.

I sent a settlement proposal to Amy, she is talking to people who handle enforcement as of mid week last week. So I hope to hear soon.

On Mon, Aug 5, 2024 at 1:21 PM Anna Kuperman <annakuperman@gmail.com> wrote:

> I mean she cleaned out the apartment mostly. She still has a bunch of shit in the basement and in the garage. And some outdoor furniture in the yard. I want to know when I can tell her that I'm changing the locks. And when I can dispose of the garbage. Is it still August 17?
>
> Last week when I arrived, She had taken all the lightbulbs out of the dining room. Then there's the refrigerator which she claims broke annd she bought a new one herself while my parents were still in charge. And there are a bunch of blinds missing. All of this mostly just as a way to annoy me. But it is all worth some money. I spent $40 on lightbulbs for the dining room. It seemed so mean spirited and petty.
>
> And I bought a bunch of new blinds because rhe ones she took down leave the living room very exposed. I haven't ordered the new refrigerator yet because we're going to get the floor done in the kitchen.
>
> She still has not given me her keys. I'm not going to ask for them or tell her that I'm changing the locks until you tell me that I don't owe her any money.
>
> When do you think you can meet with Amy McNally?
>
> When do you think you can get me a bill for you?
>
> Thanks
> Anna
>
> > On Aug 5, 2024, at 10:23 AM, JWD Legal <jeremy@jwdlegal.com> wrote:
> >
> > Wow so did all that happen? Is she out?
> >
> > On Tue, Jul 30, 2024 at 9:51 AM Anna Kuperman

<annakuperman@gmail.com>
wrote:

> Hi Jeremy. Maybe getting closer.
>
> From Amanda:
>
> You know that I've already vacated because you stayed there last week. It was empty, except for the couch, which is now gone and a few boxes, which are also gone. I don't know what you mean by "get anybody in there" because if your plan is to have work done (as you told me was your motivation for having me out) workmen can come and go at will right now.
>
> The cleaners are coming tomorrow and I've been given an estimate of 6 hours for complete clean so tomorrow might not be optimal for you to come.
>
> Also, be aware that they are tearing up the street in front of the house and there are street closures.

--
Office of Jeremy W. Dean,
Attorney at Law
P.O. Box 4391
Portland, Maine 04101
207-805-2012

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207-805-2012

Gmail **Anna Kuperman <annakuperman@gmail.com>**

# Notice of Violation - Rent Control - 305-307 Deering Ave RCC2400012

**Rent Control- City of Portland** <rentcontrol@portlandmaine.gov> Fri, May 17, 2024 at 3:45 PM
To: Anna Kuperman <annakuperman@gmail.com>

Hi Anna,

The violation is assigned to the business license, not the property owner. You are listed as the sole contact. The business license (20170812) has been the same for the duration of the tenants occupancy. I have attached the Business License History report for your reference.

Regarding the charge for May's rent, the total amount due can be negotiated with the tenant. If you and your tenant come to an agreement and our office is informed, in writing, we will consider the matter resolved.

You have notified our office of your intent to appeal the Notice of Violation. At this time the appeals court is the appropriate venue to challenge this matter. No correction will be made to the notice but you will have the opportunity to contest the findings in court.

Given the information provided it appears the registration is inaccurate. I have attached a Long Term Rental Registration application for you to complete in order to update the registration to the current ownership.

On Fri, May 17, 2024 at 8:51 AM Anna Kuperman <annakuperman@gmail.com> wrote:

> Hi Adam,
> I spoke to a lawyer finally. He told me that I should let you know that we plan on appealing the 307 side of this violation. Although I am still hopeful that I can get through to the tenant at 307 and work something out. I am not sure that will happen and so I am letting you know that we plan to file an appeal. he told me that I should let you know that we plan on appealing the 307 side of this case.
>
> In the meantime, there are a couple of things on the violation that he said I should ask you to fix. The first one is that the tenant in 307 Deering Ave. did not pay rent in May and still has not. it doesn't make sense that on the violation that you sent me on May 1 that you assumed that her rent had been paid and included that in the 2024 amount. Could you edit that? You could email the tenant at 307 for confirmation that she has not paid rent. And she did not pay it when you created the violation that you sent to me.
>
> The other part of the violation that I am hopeful can be edited is based upon ownership of the house. My parents owned the house until my dad died, and it took about a year for it to go through probate. The deed of distribution, basically where the house is named asproperty of Marina Kuperman and myself, was signed on July 26, 2022. I will include the Deed. And so the lawyer suggested that Marina and I are not responsible for 2021 or for seven months of the 2022 violation. He suggested that I call you and ask if you could edit the violation for those two years as well.
>
> I am available to talk after noon today. I will try calling you. Or if you could call me that would be fine as well. Thanks.
>
> Anna Kuperman
> 401-523-7606

> On May 16, 2024, at 7:41 AM, Rent Control- City of Portland <rentcontrol@portlandmaine.gov> wrote:
>
> Amy McNally
> 389 Congress St
> Portland ME 04101
>
> amcnally@portlandmaine.gov

On Tue, May 14, 2024 at 7:11 PM Anna Kuperman <annakuperman@gmail.com> wrote:
Ok. Can you give me Amy McNally's email address or phone number? Thanks.

On Tue, May 14, 2024 at 7:50 AM Rent Control- City of Portland <rentcontrol@portlandmaine.gov> wrote:
Hi Anna,
We cannot provide legal advice. You may consider consulting an attorney to assist with your appeal. Qualified legal counsel should be able to complete service with the information provided.

On Mon, May 13, 2024 at 7:06 PM Anna Kuperman <annakuperman@gmail.com> wrote:
Thank you. I'm not totally sure what that means. What is an "acknowledgment of service"? And is a copy of the complaint a copy of the complaint that the rental board sent me? Or isit a copy of my paper work that i am sending to the Superior Court? do I send all of this to City Hall attention Amy McNally? Or is there an another address?

Could somebody from your office give me a quick call? I think this would be very fast to answer voice to voice rather than going back-and-forth over email. My phone number is 401–523–7606. Thank you!

On May 13, 2024, at 3:20 PM, Rent Control- City of Portland <rentcontrol@portlandmaine.gov> wrote:

Hi Anna,
The Defendant would be the City of Portland only. You can use the City Hall address. You can send our legal representative, Amy McNally, an acknowledgment of service along with a copy of the Complaint. Amy can sign that so you will have proof of service to file with the court. Otherwise, you will need to serve the Clerk's office by sheriff.

On Fri, May 10, 2024 at 2:28 PM Anna Kuperman <annakuperman@gmail.com> wrote:
It also asks for name of the defendant attorney. Would that be Michael Goldman, same address as above?

On Fri, May 10, 2024 at 2:25 PM Anna Kuperman <annakuperman@gmail.com> wrote:
Hi,
I am filing an appeal to this decision. In order to file the appeal, I need to name the defendant. On the letter head it says:

City of Portland Permitting and Inspections,
Zachary Lenhert, Liscensing and Housing Safety Manager
389 Congress St.
Portland, ME 04104

Should I use this? Or who exactly am I appealing?

Thanks for any guidance.

Anna
401-523-7606

On Wed, May 1, 2024 at 10:35 AM Rent Control- City of Portland <rentcontrol@portlandmaine.gov> wrote:
The City of Portland Permitting and Inspections Department inspected the rental data for the rental unit located at 305-307 Deering Ave on **May 1, 2024** and found violations of the City of Portland Code of Ordinances, which are listed on the attached page(s). You are hereby ordered to correct these violations by **June 1, 2024**. Please be advised that penalties will be applied if the violations are not corrected by that date.

**You have a right to appeal this decision to Superior Court within 30 days of the date of this notice pursuant to Rule 80B of the Maine Rules of Civil Procedure.**

I appreciate your anticipated cooperation, and please contact our office by calling 207-874-8900 if you have any questions.

--
Licensing and Registration
389 Congress Street
Portland, Maine 04101
rentcontrol@portlandmaine.gov
207-874-8900

Notice: Under Maine law, documents - including e-mails - in the possession of public officials or city employees about government business may be classified as public records. There are very few exceptions. As a result, please be advised that what is written in an e-mail could be released to the public and/or the media if requested.

--
Licensing and Registration
389 Congress Street
Portland, Maine 04101
rentcontrol@portlandmaine.gov
207-874-8900

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--
Licensing and Registration
389 Congress Street
Portland, Maine 04101
rentcontrol@portlandmaine.gov
207-874-8900

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Licensing and Registration
389 Congress Street
Portland, Maine 04101
rentcontrol@portlandmaine.gov
207-874-8900

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Licensing and Registration
389 Congress Street

Portland, Maine 04101
rentcontrol@portlandmaine.gov
207-874-8900

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**2 attachments**

**Business License History.pdf**
218K

**2024 Long Term Rental Application_2023.11.01.pdf**
449K

Gmail **Anna Kuperman <annakuperman@gmail.com>**

# amendment to 305 lease

**Anna Kuperman** <annakuperman@gmail.com> Wed, Jun 5, 2024 at 9:55 AM
To: Sydney McMillen <sydney.mcmillen@outlook.com>
Cc: Theresa Nguyen <theresanguyent@gmail.com>, Marina <mkbeade@verizon.net>

Hi All,

I just got a note from the rent control board asking for proof of resolution. I'm hopeful that these emails serve as proof. I also went online and found a template for an amendment to a lease agreement. I signed it and am attaching it here. May it serve as fair proof of our resolution and agreement to move forward without litigation, and in good faith. Could you sign it and send it back to me in the mail or scan and send. Thanks

Anna

---------- Forwarded message ---------
From: **Sydney McMillen** <sydney.mcmillen@outlook.com>
Date: Sun, May 19, 2024 at 1:58 PM
Subject: Re: reimbursement resolution 305
To: Anna Kuperman <annakuperman@gmail.com>, Theresa Nguyen <theresanguyent@gmail.com>
Cc: Marina <mkbeade@verizon.net>

Hi Anna (and Marina),

I spoke with Theresa and am responding on behalf of both of us.

I appreciate you taking the time to come up with a clear, easy to follow plan for rent/reimbursement moving forward. Theresa and I are agreeable to the stairstep approach you've suggested as long as it is all written out like that in the lease and we aren't relying on verbal agreements.

In regards to water, we are willing to pay 305's usage bill. We would also just need a statement included in the lease the we will start paying and continue to pay for water as long as our usage can clearly be tracked (whether through the addition of a separate meter or during an interim period between tenants at 307).

I'm off of work the next few days, so please don't hesitate to text/call me if you'd like to discuss any of this further.

Best,

Sydney (and Theresa)

---

**From:** Anna Kuperman <annakuperman@gmail.com>
**Sent:** Sunday, May 19, 2024 11:22:27 AM
**To:** Sydney Jessica McMillen <sydney.mcmillen@outlook.com>; Theresa Nguyen <theresanguyent@gmail.com>
**Cc:** Marina <mkbeade@verizon.net>
**Subject:** reimbursement resolution 305

Hi Theresa and Sydney,

1. I spoke further with Marina about the appeal to the Superior Court in the case of 305 Deering. According to the violation you are owed $3102.26. Would you consider lowering that number to $3000? Then we could proceed as follows.

Rent $2350 June-September 2024

During these 4 months you pay $2000.

350 x 4 = 1400 towards the reimbursement.

Rent $2400 October 2024-July 2025 (as we talked about on the phone a week or two ago).

You pay $2000 for rent between October 2024-January 2025.

400 x 4 = 1600 towards the reimbursement.

You pay $2400 in rent February 2025-July 2025.

350 x 4 = 1400
400 x 4 = 1600

2. I also want to ask one more time if you'd consider paying your water bill if the 307 side is empty and/or if we install a second meter.

Thanks for your consideration. Let me know what you think.

Anna and Marina
>
>

---

**20240605094532607.pdf**
65K

# City of Portland — Housing Safety Division

## RENT INCREASE APPLICATION – MAINTENANCE OF NET OPERATING INCOME

**Date of Hearing:**

April 22, 2026

**Owner Name and Address:**

Wilbur Cheever
38 William St, Portland, ME 04103

**Property Address:**

72 William St, all 3 units

**CBL:**

117-C-019-001

**Tenants/Interested Parties:**

Yes

# 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)].
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: 72 William St.

Parcel Numbers(s): 117-C018-001

Year Property Purchased by Current Owner: 1992

Total Number of Units on the Property: 3

Total Number of Units Affected by Proposed Rent Increase: 3

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

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

## Section 1. Landlord Information

Name: Will Chewer

Phone(s): 207-831-0496

Business Address: 39 William St

City, State, Zip: Bath, ME 04103

Business E-mail: wdchewer@gmail.com

## Section 2. Agent Information (if applicable)

Name: _____

Phone(s): _____

Business Address: _____

City, State, Zip: _____

Business E-mail: _____

## Section 3. 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: | ☐ | ☐ | ☐ |

March 31, 2026

Dear Rent Board,

I have owned both my properties for more than 30 years and strive to provide safe, quality housing at a reasonable value. I attempt to keep my rents below market, provide exceptional service and take pride in the spaces my tenants live in.

My starting point for the base rent for both buildings is low mostly due to the fact I had not raised my rents along with the rate the rents were getting inflated all over the city during the two decades prior. I try to only raise my tenants' rents every 3-5 years so I got caught on the low side of this rapid market inflation. This is my basis for asking for the base rent of 2019 to be elevated in both buildings. I had historically used the change in tenancy to bring my leases up closer to market rate which as I understand can't happen without first submitting a request along with the 28 page MNOI form filled out and handed in.

In 72 William St. I have invested $206,000 in completely rehabbing all three units and updating the exterior over the past five years. At the end of the day I am asking the rent board to look at if I can be closer to market rate for all three units and allow me to recoup on my investment improving all three units making them safer and more comfortable spaces to live in.

At 76 William St. I changed the 2nd floor from a one bedroom to a two bedroom to accommodate a long term tenant's life change. With this change I'm asking the rent board to change the base rate of this unit more significantly than the other two units, although their base rent rates should be elevated as well. How do I update/change this apartment from a one bedroom to a two bedroom listing?

I do apologize for being naive and thinking I could invest in improving the spaces between long term tenants and using that timing and expense to bring the rents up to market rates. I didn't understand the MNOI process (still struggling with it but trying) as the vehicle to present to the rent board for changing the rates for each unit.

I understand you are attempting to be transparent and fair while encouraging landlords to invest in keeping their properties safe places to live. Unfortunately for myself and my tenants the process is cumbersome and difficult to navigate. I have done my best to provide the information you ask for and follow the intricate computations. All my documentation for costs of goods and services is in stored paper invoices and statements which is hard to put in any other format than handing you a box with these documents in them.

Thanks-

Will Cheever

## Section 4. 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.

off street parking, on site laundry, snow removal & landscaping

all provided services included

hot water included

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

## Section 5. 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)

## Section 6. 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 19, 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 18 of this Application.**

## Section 7. Income Worksheet

| | Base Year (2019)[1] | Current Year (2025) |
|---|---|---|
| **Rental Income** | | |
| 1. Gross scheduled rental income (total for the calendar year) including uncollected rent. | $ 31,400 | $ 63,300 |
| 2. Portion Attributable to Vacancy | $ 2400 | $ 7350 |
| **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.

## Section 8. Operating Expense Worksheet

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

| | Base Year (2019) | Current Year (2025) |
|---|---|---|
| 1. Assessments | $ | $ |
| 2. Real Property Taxes | $ 7207 | $ 9301 |
| 3. License Tax/Fee | $ | $ |
| 4. Rent Board Registration Fees | $ 98 | $ 98 |
| 5. Insurance | $ 1811 | $ 2704 |
| 6. Accounting | $ | $ |
| 7. Legal (explain types of legal expenses) | $ | $ |
| 8. Manager /Management Services | $ | $ |
| 9. Security | $ | $ |
| 10. Office Supplies | $ | $ ~~3883~~ |
| 12. Normal Repairs | $ 6422 | $ 3883 |
| 13. Owner-Performed Labor | $ 5200 | $ 6760 |
| 14. Plumbing Maintenance | $ | $ |
| 15. Pool Maintenance | $ | $ |
| 16. Landscape Maintenance/snow removal | $ 2516 | $ 3436 |
| 17. Other Maintenance | $ | $ |
| 18. Parking Lot/Street Maintenance | $ | $ |
| 19. Gas (separately metered only) | $ | $ |
| 20. Electricity (separately metered only) | $ | $ |
| 21. Water -all utilities | $ 3245 | $ 2941 |
| 22. ~~Sewer~~ stormwater | $ 329 | $ 280 |
| 23. Amortized portion of Capital Expense (see Sections 10, 11 and 12 column (i)) | $ | $ 23,181 |
| 24. Vandalism Repairs | $ | $ |
| 25. Uninsured Damages | $ | $ |
| **27. TOTAL OPERATING EXPENSES** | $ 26,655 | $ 53,074 |

## Section 9. 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 11, 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 |

## Section 10. 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 |
| 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.

## Section 11. Interest Allowance on Capital Improvements

If an amount was reported as an amortized portion of expenses on Section 11, 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) 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 Base Year [add amounts in column (d)]: $ _____

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

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) 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 |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 2025 new roof | 3 | $ 12,500 | 2.38% | 10 | $ 6002 | $ 18,502 | $ 1850 | $ 154 | $ 51 |
| 2 | 2025 3-2 flex | 1 | $ 72,900 | 8.38% | 10 | $ 34,202 | $ 107,102 | $ 10,710 | $ 892 | $ 892 |
| 3 | 2023 fence | 3 | $ 4,200 | 8.38% | 10 | $ 1721 | $ 5921 | $ 592 | $ 49 | $ 16 |
| 4 | 2021 HVAC | 1 | $ 33,950 | 8.38% | 10 | $ 16,307 | $ 50,257 | $ 5025 | $ 419 | $ 419 |
| 5 | 2020 HVAC | 1 | $ 11,342 | 8.38% | 10 | $ 5446 | $ 16,788 | $ 1679 | $ 140 | $ 140 |
| 6 | 2022 exterior | 3 | $ 15,923 | 8.38% | 10 | $ 7645 | $ 23,568 | $ 2357 | $ 196 | $ 65 |

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

Total for Current Year [add amounts in column (d)]: $ 155,615

Annual Cost for Current Year [add amounts in column (i)]: $ 23,181

Section 12. Blank Worksheet (Optional – Available for Petitioner Use)

## Section 13. 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 |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |

## Section 14. 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) Item # | (b) Brief Description and Expected Date of Completion | (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 |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Full reno #2 5/1/26 | 1 | $ 65,000 | 8.25 % | 10 | $31,209 | $96,209 | $9621 | $802 | $ |
| | | | $ | % | | $ | $ | $ | $ | $ |
| | | | $ | % | | $ | $ | $ | $ | $ |
| | | | $ | % | | $ | $ | $ | $ | $ |
| | | | $ | % | | $ | $ | $ | $ | $ |

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

Proposed Capital Expenses [add amounts in column (d)]: $ 65,000

Annual Cost for Proposed Capital Expenses [add amounts in column (i)]: $ 9621

## Section 15. Net Operating Income (NOI)

Net Operating Income = Income – Operating Expenses

| | Base Year (2019) | Current Year (2025) |
|---|---|---|
| 1. Total Annual Income | $ 37,400 | $ 62,300 |
| 2. Annual Operating Expenses | $ 26,655 | $ 53,074 |
| 3. Net Annual Operating Income | $ 12,745 | $ 10,226 |
| 4. CPI [Annual Average CPI] | 281.082 | 346.889 |

5. Percent Annual Increase in CPI Base Year to Current Year

$$\frac{\text{Line 4 Current Year-Line 4 Base Year}}{\text{Line 4 Base Year}} \times 100$$

23.412 %

6. Fair Net Annual Operating Income = Base Year Net Operating Income Adjusted by CPI Increase

$$\frac{\text{Line 5} + 100}{100} \times \text{Line 3 Base Year}$$

$ 15,723.86

7. Fair Net Annual Operating Income Minus Current Net Operating Income = Allowable Rent Increase

Line 6 – Line 3 Current Year

$ 5702.86

8. Allowable Rent Increase/Unit/Month[3]

Line 7 ÷ 12 ÷ # of Units

$ 158

[3] If applied equally per unit. The Landlord may propose to allocate using a different rational basis. To detail a different allocation, complete Section 18 Proposed Adjustment Worksheet.

## Section 16. 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 proposed | AIP & New Tenant Taken (%) | AIP & New Tenant Deferred (%) | Other Charges (Please specify) | Comment |
|---|---|---|---|---|---|---|---|
| 1 | $ 2100 | $ 0 | | % | % | $ | same tenants for 3 years |
| 2 | $ 1700 | $ 600 | 5/1/26 | 35 % | % | $ | empty for 4 months in 2026 |
| 3 | $ 1500 | $ 600 | 5/1/26 | 40 % | % | $ | empty for 4 months in 2025 |
| | $ | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |

## Section 17. 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: _____

| 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 | $ 1500 | 05/12/2022 | $ 2000 | 01/01/2025 | $ 1500 | $ 2100 | $ 2100 |
| 2 | $ 1200 | Vacant | $ Vacant | 7/1/25 | $ 1700 | $ Vacant | $ 2300 |
| 3 | $ 950 | 5/1/25 | $ 1500 | — | $ 1500 | $ 1500 | $ 2100 |
| | $ | | $ | | $ | $ | $ |
| | $ | | $ | | $ | $ | $ |
| | $ | | $ | | $ | $ | $ |
| | $ | | $ | | $ | $ | $ |
| | $ | | $ | | $ | $ | $ |
| | $ | | $ | | $ | $ | $ |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |

## Section 18. 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 19 and the following Sections 20 and 21 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 20 will be performed with an Adjusted Gross Income, and that will be substituted for the Section 16 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 |

neighborhood 1700

[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: $ 57,400

Proposed Adjusted Gross Income for 2019: $ 61,200

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.

1700 (3) 12 = 61,200 US Dept. of Housing 2019
2 bedroom before utilities
*adjusted for neighborhood rates

1= 1700 neighborhood market value 2019
2= 1800 neighborhood market value 2019
3=3 1600 neighborhood market value 2019

5100 (12) = 61,200

or accept increases for new units after
apartments fully remodled?

#3 5/1/2025

#2 5/1/2026

## Section 19. Income and Operating Expense Worksheet With Adjustment of Base Year

| | Base Year (2019) | Current Year (2025) |
|---|---|---|
| **Rental Income** | | |
| 1. Adjusted Gross Income (with Adjusted Base Year as proposed in Section 19) | $ 61,200 | $ 68,300 (1.85% avg/yr) |
| 2. Portion Attributable to Vacancy | $ 2400 | $ 7350 |
| **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) | $ 61,200 | $ 68,300 |

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

## Section 20. 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 (2025) |
|---|---|---|
| 1. Total Annual Income | $ 61,200 | $ 68,300 |
| 2. Annual Operating Expenses | $ 26,655 | $ 54,329 |
| 3. Net Annual Operating Income | $ 34,545 | $ 13,971 |
| 4. CPI [Annual Average CPI] | 281.082 | 346.889 |

5. Percent Annual Increase in CPI Base Year to Current Year

$$\frac{\text{Line 4 Current Year-Line 4 Base Year}}{\text{Line 4 Base Year}} \times 100$$

23.41 %

6. Fair Net Annual Operating Income = Base Year Net Operating Income Adjusted by CPI Increase

$$\frac{\text{Line 5} + 100}{100} \times \text{Line 3 Base Year}$$

$ 42,632

7. Fair Net Annual Operating Income Minus Current Net Operating Income = Allowable Rent Increase

Line 6 – Line 3 Current Year

42,632 - 34,545 =

$ 8087

8. Allowable Rent Increase/Unit/Month[6]

Line 7 ÷ 12 ÷ # of Units

$ 224

[6] If applied equally per unit. The Landlord may propose to allocate using a different rational basis. To detail a different allocation, complete Section 18 Proposed Adjustment Worksheet.

# CITY OF PORTLAND

389 CONGRESS ST
PORTLAND, ME 04101

For the fiscal year July 01, 2019 to June 30, 2020

BILL #: 9438
ACCOUNT #: 15907
CBL: 117-C-019-001
LOCATION: 72 WILLIAM ST

CHEEVER WILBUR D JR
45 AUSTIN ST
PORTLAND, ME 04103

Owner of Record as of: April 1, 2019
CHEEVER WILBUR D JR

| CURRENT BILL RATE DISTRIBUTION | | |
|---|---|---|
| SCHOOL | 11.690 | $3,680.01 |
| COUNTY | 0.830 | $261.28 |
| MUNICIPAL | 10.790 | $3,396.69 |
| TOTAL | 23.310 | $7,337.99 |

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

Assessed Property Description:
117-C-19
WILLIAM ST 72-74

6181 SF
Acres: 0.142

## FY20 REAL ESTATE TAX BILL

| BILLING INFORMATION | |
|---|---|
| LAND VALUE | $87,300 |
| BUILDING VALUE | $227,500 |
| TOTAL VALUE | $314,800 |
| EXEMPTIONS | $0 |
| TAXABLE VALUE | $314,800 |
| TAX RATE | 23.310 |
| TOTAL TAX | $7,337.99 |
| PAYMENTS/CREDITS | $0.00 |
| TAX DUE | $7,337.99 |

| DATE DUE | AMOUNT DUE |
|---|---|
| 10/18/2019 | $3,669.00 |
| 03/20/2020 | $3,668.99 |

00 25448 00

**INTEREST AT 9% PER ANNUM CHARGED BEGINNING 10/19/2019 AND 03/21/2020.**

## 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, 2019.
**IF THIS PROPERTY HAS BEEN TRANSFERED, 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 15.12% higher. The current City and School bonded indebtedness is $319,660,011.**
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.

PORTLAND GASFITTING
COMMERCIAL • RESIDENTIAL

(207) 332-3876
5 EASTFIELD ROAD CAPE ELIZABETH, ME 04107

# JOB INVOICE
4437

TO Yankee Restoration c/o Will
145 Austin Street
Portland, ME 04103

TERMS:

PHONE 831-0486 | DATE OF ORDER Oct 7 2019
ORDER TAKEN BY Bob Locke | CUSTOMER'S ORDER NUMBER
☒ DAY WORK ☐ CONTRACT ☐ EXTRA
JOB NAME/NUMBER Rinnai Installation
JOB LOCATION Williams St. 12#1
JOB PHONE 831-0486 | STARTING DATE Oct 7 2019

| QTY. | MATERIAL | PRICE | AMOUNT | DESCRIPTION OF WORK |
|---|---|---|---|---|
| > | | | | Install Rinnai RHFE263FA II (USED) |
| 1 | Rinnai RHFE263FA II USED HEATER - | | 750 00 | Rear Bedroom off kitchen |
| | | | | CONVERSION to NAT GAS |
| | 36" Dormont Gas Connector Conversion kit | | Inc<br>Inc | SERIAL # 08080001739 |

PAID CK 4803

| OTHER CHARGES | |
|---|---|
| | |
| TOTAL OTHER | |

| LABOR | HRS. | RATE | AMOUNT |
|---|---|---|---|
| FLAT. | | | 200 00 |

$950.00

| | |
|---|---|
| TOTAL LABOR | 200 00 |
| TOTAL MATERIALS | 750 00 |
| TOTAL OTHER | |
| TAX | Inc |
| TOTAL | 950 00 |

DATE COMPLETED

TOTAL MATERIALS 750 00

Work ordered by _____

Signature _____
I hereby acknowledge the satisfactory completion of the above described work.

Thank You

# YANKEE RESTORATION BUILDING

Date:

Client name: MW 72 William St 2019 total $3128

Job Location & Description:

Weather (Temp/wind/sky): chimney removal

| TIME IN/OUT & LUNCH | | | |
|---|---|---|---|
| NW | | | |
| TH | | | |
| DJ | | | |
| MS | | | |
| | | | |

| MATERIAL DELIVERY: | MATERIALS FROM STOCK: | MACHINE USE FEES: |
|---|---|---|
| Vendor: | | Del/Set-up: $_____ |
| | | Hours used: |
| | | _____ x $65 = _____ |

| TRADESMAN/HOURS | | | | | | | CODE# | DESCRIPTION (use reverse side as needed) |
|---|---|---|---|---|---|---|---|---|
| MS | NW | TH | WC | DJ | KB | 5 | | |
| | | | | | | 2½ | | 10.8 chimney removal |
| | | | | | | 2 | | 10.10 chimney removal |
| | | | | | | 1 | | 10.13 remove bricks |
| | | | | | | | | 5.5 (KS) = $ 71.50 Ref. # 4911 |
| | | | | | | 5½ | | TOTAL BILLABLE HOURS |

[illegible]
335 ST. JAMES STREET
PORTLAND, ME 04102

12/09/2019 11:59:23

CREDIT CARD
VISA SALE

Card #
Chip Card: XXXXXXXXXXXX7682
AID: Visa Credit
SEQ #: A0000000031010
Batch #: 3
INVOICE 690
Approval Code 3
009696
Chip Read
Issuer

$70.61

CUSTOMER COPY

Doll $2344

# SHIPPING RECEIPT

Triple's Inc. 105 St. James Street, Portland, ME 04102
(207) 774-4444 or (207) 874-6452

Page No. 1 of 1

11:49:38 12/09/19

G&E PARTS CENTER

[illegible]URT, UPPER MARLBORO, MD 20774
[illegible] - 1(800)-TRIBLES - TOLL FREE FAX 1 (800)-367-3748

[illegible]UNT #28 PORTLAND
SALES TAX

Ord#:52980/00

015298000

| REFERENCE# |
|---|
| 13922630 |

MASTERCARD / VISA

| | CUSTOMER P.O. NO. | SHIP VIA | DATE ORDERED | DATE REQUESTED | WH |
|---|---|---|---|---|---|
| [illegible]3 | CHEEVER | COUNTER | 12/09/19 | 12/09/19 | 28 |

| [illegible]ON/ITEM ORDERED | QTY ORDERED | QTY SHIPPED | QTY B/O | NET UNIT PRICE | ORDER EXTENSION | U/M | BIN LOCATION |
|---|---|---|---|---|---|---|---|
| [illegible]S-DRUM/ | 1 | 1 | | 36.70 | 36.70 | EA | WCI |
| BEARING KIT | 1 | 1 | | 30.23 | 30.23 | EA | WCI |

13922630

X _____ _____
SIGNATURE PRINT NAME

**MERCHANDISE RETURNS**

Our goal is to sell you the correct part always. Even so there are times when returns must be made. We will gladly assist you, however, some restrictions apply.
Merchandise may not be returned when:

SPECIAL ORDERED — USED OR UNSALABLE
ELECTRICAL OPEN BOX/BAG — MORE THAN 60 DAYS OLD
FACTORY CARTON DAMAGED

All returns must be accompanied by a sales receipt and returns may be charged a 20% restocking charge.
All parts in warranty are returnable without restock charges and are subject to the manufacturer's warranty policy.
See reverse side for full return policy. _____INITIALS

FILLED BY: SHIPPED BY:
CHECKED BY: SHIPPING:

HARDI
BLUE HAWK
HVAC/R DISTRIBUTOR COOPERATIVE

| | |
|---|---|
| 66.93 | SHIPMENT TOTAL |
| 66.93 | ORDER TOTAL |
| 3.68 | SALES TAX |
| | FREIGHT |
| 70.61 | TOTAL |
| | DEPOSIT |
| 70.61 | AMOUNT DUE |

* COMPLETE *

0000070903

191209

CHEEVER

CONSUMER ACCOUNT #28 PORTLAND 52980
*MUST COLLECT SALES TAX

CONSUMER ACCOUNT #28 PORTLAND
*MUST COLLECT SALES TAX

Packing Slip

**********

**In the event that any discrepancy is found on this order, your claim must be filed at the shipping location within 30 days of the shipment date.**

**CITY OF PORTLAND, MAINE**
389 Congress Street
Portland, ME 04101

Questions on your bill? Please call: **(207) 874-8660**
or email us at: swbill@portlandmaine.gov
Questions on your impervious space or credits? Please call: **(207) 874-8462**

2019 tax
#223

RE: 708094
CHEEVER WILBUR D JR
38 WILLIAM ST
PORTLAND, ME 04103

## STORMWATER BILL

00 21135 00

ACCOUNT#:
**708094**

DATE:
**10/25/2019**

DATE DUE:
**11/21/2019**

TAX YEAR: **2020** PERIOD: **October - December**

CBL:
**117 C019001**

AMOUNT DUE:
**$56.70**

BILLING CYCLE **QUARTERLY**

| | |
|---|---|
| PROPERTY LOCATION | **72 WILLIAM ST** |
| BUILDING IMPERVIOUS AREA | **2,129** SQ/FT |
| SURFACE IMPERVIOUS AREA | **1,738** SQ/FT |
| TOTAL IMPERVIOUS AREA | **3,867** SQ/FT |
| BILLABLE UNITS (per 1200 sq ft) | **3** |
| PROPERTY DWELLING(S) AT LOCATION | **1** |
| MONTHLY RATE PER BILLABLE UNIT | **$6.30** |

| | |
|---|---|
| OUTSTANDING BALANCE | **$0.00** |
| CURRENT CHARGES (see below) | **$56.70** |
| CREDITS APPLIED | **$0.00** |
| INTEREST CHARGES | **$0.00** |
| TOTAL AMOUNT DUE | **$56.70** |

Current Charge is calculated as follows:
Billable units divided by the property dwelling(s) at location multiplied by the current monthly rate.

**PAY YOUR BILL ONLINE AT: PORTLANDMAINE.GOV/STORMWATERBILLING**

#4925

| City of Portland<br>389 Congress St, Portland, ME 04101<br>Real Estate Property Tax Statement | | **FY 2019** | For Fiscal Year 2019<br>July 01, 2018 - June 30, 2019 | |
|---|---|---|---|---|
| DUE Sep 21, 2018 | DUE Mar 08, 2019 | AMOUNT PAID | INTEREST DUE | PAY THIS AMOUNT |
| $3,538.35 | $3,538.35 | $3,538.35 | $0.00 | $3,538.35 |

30573

CBL: 117-C-019-001

CHEEVER WILBUR D JR
45 AUSTIN ST
PORTLAND, ME 04103

taxes
2019
$7207

ACCOUNT NUMBER: 15907
ACRES: 0.142
BILL NUMBER: **9330**

Owner of Record as of: April 1, 2018
CHEEVER WILBUR D JR

Assessed Property Description:
117-C-19
WILLIAM ST 72-74
6181 SF

| CURRENT BILLING DISTRIBUTION | | |
|---|---|---|
| Education | $3,503 | 49.50% |
| Public Safety | $1,260 | 17.80% |
| Debt Service | $991 | 14.00% |
| Public Works | $382 | 5.40% |
| County Tax | $248 | 3.50% |
| Rec & Fac Mgmt | $198 | 2.80% |
| Health & Human Svcs | $170 | 2.40% |
| Library | $163 | 2.30% |
| Metro | $106 | 1.50% |
| General Government | $57 | .80% |
| | | 100.00% |

| CURRENT BILLING INFORMATION | |
|---|---|
| Land Value | $87,300 |
| Building Value | $227,500 |
| Total Value | $314,800 |
| Exemptions | $0 |
| Taxable Value | $314,800 |
| Tax Rate | 22.48 |
| TOTAL TAX DUE | $3,538.35 |
| AMOUNT PAID | $3,538.35 |

**KEEP THIS PORTION FOR YOUR RECORDS**

**FOR IMPORTANT PAYMENT INFORMATION, PLEASE SEE BACK OF BILL**

#4702

VERMONT MUTUAL
INSURANCE GROUP
SINCE 1828

*Underwritten by Vermont Mutual Insurance Company*

PHONE: 1-800-231-7820
**PAY BY PHONE: 1-866-315-6261**
EMAIL: directbill@vermontmutual.com
WEBSITE: VermontMutual.com
BUSINESS HOURS:
Mon-Thurs 7:45-4:30 Fri 7:45-3:15

Invoice Date: 04/29/2019

## NOTICE OF PREMIUM DUE - DWELLING FIRE

**Bill To:**
WILBUR CHEEVER JR
45 AUSTIN ST
PORTLAND, ME 04103-4514

**Location Address*:**
72 WILLIAMS ST
PORTLAND, ME 04103-4965

**If multiple locations, only 1st location appears.*

### ACCOUNT ACTIVITY SUMMARY

| | |
|---|---|
| Premium Balance | $1,939.00 |
| Prior Term Balance | $0.00 |

P.O. # 4742

### AMOUNT DUE

| | |
|---|---|
| **To Pay in Full** | **$1,939.00** |
| **Minimum Amount Due** | **$489.75** |
| **Due Date** | **06/03/2019** |

Sign up today for Vermont Mutual's *myVM* and enjoy 24/7 access to:

- Policy Information
- Claim Status
- Online Payment Options
- Convenience Reminders

*...and more!*

myVM SINCE 1828

**myVM.VermontMutual.com**

### POLICYHOLDER INFO

Policy Number: DF13073759
Policy Period: 06/03/2019 - 06/03/2020
Insured: WILBUR CHEEVER JR
Invoice Type: Renewal Invoice

**Agent:** ANDERSON-WATKINS ASSOC INC-WB
(207) 856-5500

*Please notify the above agent of any name, address or policy changes.*

Your next scheduled installment will be due on 08/08/2019

Please detach and return remittance form below with your payment. All payments will be deposited upon receipt.

Unitil
ME GAS OPERATIONS

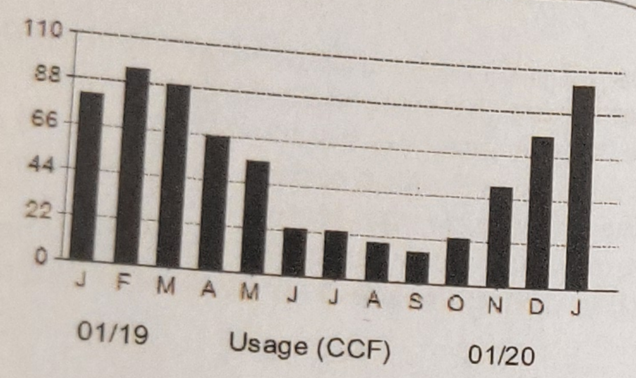
energy for life

# AMOUNT DUE $123.22

| ACCOUNT NUMBER | BILL DATE | PLEASE PAY BY | NEXT METER READING DATE |
|---|---|---|---|
| 5100468500 | 01/21/20 | 02/18/20 | 02/18/20 |

72 WILLIAM ST HOUSE, PORTLAND CHEE






## AT A GLANCE

| | | | |
|---|---|---|---|
| AMOUNT OF LAST BILL | $98.85 | TOTAL CURRENT CHARGES | $123.22 |
| PAYMENT - THANK YOU 01/13/20 | ($98.85) | PLEASE PAY AMOUNT | $123.22 |

2.10.20

| METER NUMBER | METER READING PREVIOUS | METER READING PRESENT | METER CONSTANT | METERED USAGE | NUMBER OF DAYS | METERED DEMAND | RATE CODE |
|---|---|---|---|---|---|---|---|
| H62425 | 9135 | 9234 | | 99.00 CCF | 31 | | R1 |

**BALANCE FORWARD** **$0.00**

**GAS SERVICE** **PERIOD 12/17/19 - 01/17/20**

METERED USAGE 99 CCF x 1.04771 = 103.72 THERMS

DELIVERY CHARGES

| | | | | | |
|---|---|---|---|---|---|
| CUSTOMER CHARGE | | | | | 26.20 |
| DISTRIBUTION CHARGE FIRST | 40.00 | Therms | x | $0.3848 | 15.39 |
| DISTRIBUTION CHARGE NEXT | 63.72 | Therms | x | $0.2836 | 18.07 |
| ERC | 103.72 | Therms | x | $0.0059 | 0.61 |
| **Total Current GA Charges** | | | | | **$60.27** |

**GAS SUPPLIER SERVICE** **PERIOD 12/17/19 - 01/17/20**

SUPPLY CHARGES AT COST

| | | | | | |
|---|---|---|---|---|---|
| COST OF GAS | 103.72 | Therms | x | $0.6069 | 62.95 |
| **Total Current GS Charges** | | | | | **$62.95** |

## MESSAGES

Unitil offers a Low-Income Discount Program to all income-eligible heating and non-heating customers identified by the Maine State Housing Authority as eligible for LIHEAP funds and will provide for a 30% discount off the total billed charges. Please visit our website or contact our Customer Service Center for details.

| | |
|---|---|
| TOTAL CURRENT BILL | $123.22 |
| TOTAL AMOUNT DUE | $123.22 |

Portland Water District

Send Correspondence to:
Address:
225 Douglass St.
P.O. Box 3553
Portland, ME 04104-3553

Office Hours:
8:00 a.m. - 4:30 p.m.
Monday through Friday
Phone: 207.761.8310

Web Site and E-Mail:
www.pwd.org
customerservice@pwd.org

| | |
|---|---|
| Customer Name | CHEEVER WILBUR |
| Service Address | 72 WILLIAM ST PORTLAND |
| Account Number | 124698-03 |

********** **Payment due by 02/03/2020.** ********** Page 1 of 1

## Account Detail:

| | MEMBER WATER CHARGES | CITY OF PORTLAND* WASTEWATER CHARGES | TOTAL |
|---|---|---|---|
| | | | $187.07 |
| PREVIOUS BALANCE | | | $187.07 CR |
| Payment - Thank You | | | $0.00 |
| BALANCE FORWARD | | | |
| CURRENT CHARGES | | | $199.91 |
| Consumption Charge | $43.91 | $156.00 | $199.91 |
| Total Current Charges | $43.91 | $156.00 | $199.91 |
| TOTAL AMOUNT DUE | | | $199.91 |

2019
$1636

R E 2/3

YOUR
13 MONTH CONSUMPTION SUMMARY
(Hundred Cubic Feet)

| Month | Water | Waste Water | Days |
|---|---|---|---|
| 01/20 | 15 | 15 | 30 |
| 12/19 | 14 | 14 | 33 |
| 1/19 | 12 | 12 | 30 |
| 2/19 | 08 | 8 | 33 |
| /19 | 06 | 6 | 28 |
| 19 | 09 | 9 | 31 |
| 9 | 09 | 9 | 29 |
| 9 | 10 | 10 | 31 |
| | 12 | 12 | 35 |
| | 09 | 9 | 24 |
| | 09 | 9 | 28 |
| | 10 | 10 | 29 |
| | 11 | 11 | 33 |

bic Feet = 748 Gallons

* *WASTEWATER RATES ARE SET BY THE CITY OF PORTLAND*

## Customer Meter Summary:

METER TYPE: **P** = Primary **S** = Submeter **R** = Reverse Submeter **F** = Fireline

| METER NUMBER | METER TYPE | READ DATE | PRIOR READ DATE | BILL DATE | CURRENT METER READING | PRIOR METER READING | CONSUMPTION (HCF) |
|---|---|---|---|---|---|---|---|
| A17049409 | P | 01/03/20 | 12/04/19 | 01/10/20 | 1726 | 1711 | 15 |

## Notes

11862



**CENTRAL MAINE POWER**

Manage your account online: **cmpco.com**
Customer assistance line: **1.800.750.4000**
Outage reporting line: **1.800.696.1000**

| Account Number | Service Location | Amount Due | Date Due |
|---|---|---|---|
| **3501-0813-232** | WILL CHEEVER<br>72 WILLIAM ST<br>PORTLAND ME 04104 | **$26.48** | **02/11/2020** |
| Invoice Number<br>716000670825 | | | |

## Your Messages

We've updated your bill to provide even more usage information – you'll see up to 36 months of usage now! You can access your daily and hourly usage information from your smart meter by enrolling in Energy Manager at cmpco.com/EnergyManager.

Resolve to be energy fit in 2020 - and beyond! Our free products and services can help. Save money on energy costs with Usage Alerts, save energy with Energy Manager, and save time with eBill and AutoPay. Visit cmpco.com today to learn how you can start saving now.

Understanding how your energy dollars are spent can help you make decisions about how you use energy in your home. Energy Manager and Usage Alerts can help you figure out your energy usage, reduce costs and save! Visit cmpco.com today to learn more about these FREE tools.

You can pay your bill without lifting a finger with AutoPay. Your secure payment will be made on time automatically each month. Enroll in AutoPay today at cmpco.com and let your bill take care of itself.

Powered by your smart meter, our FREE Usage Alerts provide you with weekly energy use updates, an alert if you exceed a set amount of usage or cost and notifications of your energy use by text, email, phone call or all three. Sign up for Usage Alerts today at cmpco.com and start saving now.

## Your Account Summary

| | |
|---|---|
| **Prior Balance** | **$24.50** |
| Payments received through 01/15/2020 - Thank you | -$24.50 |
| | **$0.00** |
| **Balance Forward** | **+$16.89** |
| **Electricity Delivery Central Maine Power** | **+$9.59** |
| **Electricity Supply Standard Offer** | **$26.48** |
| **Please pay by 02/11/2020** | |

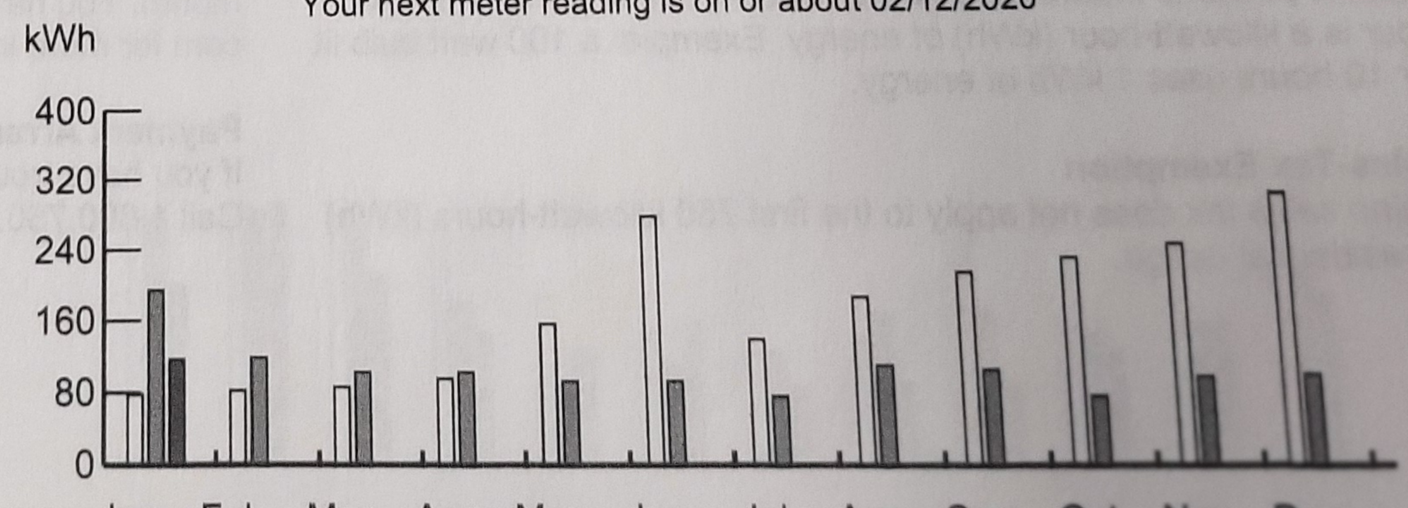
2018
$335

2-10-20

010102 1/2

## Your Monthly Usage Summary(kWh)

Your next meter reading is on or about 02/12/2020




| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2019 | 6 | 4 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| 2018 | 3 | 3 | 3 | 3 | 5 | 8 | 5 | 6 | 6 | 8 | 8 | 9 |

**Your Average Daily Usage (kWh)**

# CITY OF PORTLAND

389 CONGRESS ST
PORTLAND, ME 04101

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

## FY25 REAL ESTATE TAX BILL

| CURRENT BILL RATE DISTRIBUTION | | |
|---|---|---|
| SCHOOL | 7.880 | $4,780.01 |
| COUNTY | 0.560 | $339.70 |
| MUNICIPAL | 6.570 | $3,985.36 |
| TOTAL | 15.010 | $9,105.07 |

| BILLING INFORMATION | |
|---|---|
| LAND VALUE | $92,800 |
| BUILDING VALUE | $513,800 |
| TOTAL VALUE | $606,600 |
| EXEMPTIONS | $0 |
| TAXABLE VALUE | $606,600 |
| TAX RATE | 15.010 |
| TOTAL TAX | $9,105.07 |
| PAYMENTS/CREDITS | $0.00 |
| ABATEMENT/ADJUST | $0.00 |
| TAX DUE | $9,105.07 |

BILL #: 2504471
ACCOUNT #: 15907
PARCEL ID #: 117-C-019-001
LOCATION: 72 WILLIAM ST

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

CHEEVER WILBUR D JR
33 WILLIAM ST
PORTLAND, ME 04103

Assessed Property Description:
117-C-19
WILLIAM ST 72-74

6181 SF
Acres: 0.142

| DATE DUE | AMOUNT DUE |
|---|---|
| 10/18/2024 | $4,552.54 |
| 03/14/2025 | $4,552.53 |

Owner of Record as of: April 1, 2024
CHEEVER WILBUR D JR

**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

389 CONGRESS ST
PORTLAND, ME 04101

For the fiscal year July 01, 2025 to June 30, 2026

## FY26 REAL ESTATE TAX BILL

BILL #: 2629940
ACCOUNT #: 15907
PARCEL ID #: 117-C-019-001
LOCATION: 72 WILLIAM ST

| CURRENT BILL RATE DISTRIBUTION | | |
|---|---|---|
| SCHOOL | 6.270 | $5,493.77 |
| COUNTY | 0.450 | $394.29 |
| MUNICIPAL | 5.260 | $4,608.81 |
| TOTAL | 11.980 | $10,496.88 |

| BILLING INFORMATION | |
|---|---|
| LAND VALUE | $142,100 |
| BUILDING VALUE | $734,100 |
| TOTAL VALUE | $876,200 |
| EXEMPTIONS | $0 |
| TAXABLE VALUE | $876,200 |
| TAX RATE | 11.980 |
| TOTAL TAX | $10,496.88 |
| PAYMENTS/CREDITS | $0.00 |
| ABATEMENT/ADJUST | $0.00 |
| TAX DUE | $10,496.88 |

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

R/ w/ mortgage

CHEEVER WILBUR D JR
33 WILLIAM ST
PORTLAND, ME 04103

Assessed Property Description:
117-C-19
WILLIAM ST 72-74

6181 SF
Acres: 0.142

Owner of Record as of: April 1, 2025
CHEEVER WILBUR D JR

| DATE DUE | AMOUNT DUE |
|---|---|
| 10/17/2025 | $5,248.44 |
| 03/20/2026 | $5,248.44 |

**INTEREST AT 7.5% PER ANNUM CHARGED BEGINNING 10/18/2025 AND 03/21/2026.**

## 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, 2025.
**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

2025 total
$ 0254

Thank you! Your order has been placed. Click here to print your receipt.
**Order Number:** 811457
**Order Timestamp:** Sat Feb 22 14:51:05 CST 2025

| | | | |
|---|---|---|---|
| | Custom Hinge Rail (22999)<br>Hinge Rail (Custom Size & Color)<br>READY TO SHIP WITHIN 23 DAYS | 1 | $118.32 |

| | |
|---|---|
| Merchandise Total: | $118.32 |
| Shipping: | $0.00 |
| Tax: | $6.51 |
| **Total:** | **$124.83** |

**SHIPPING**
Will Cheever
Yankee Restoration & Bldg
38 William St.
PORTLAND ME 04103
US
wdcheever@gmail.com
(207) 831-0486

**BILLING**
Will Cheever
Yankee Restoration & Bldg
38 William St
Portland ME 04103-4828
US
wdcheever@gmail.com
(207) 831-0486
PO Number: WDC Properties

**SHIPPING OPTION**
UPS Ground Shipping: 1-7 Business Days

**PAYMENT**
Card Type: Visa
Card Number: XXXXXXXXXXXX0441
Card CodeUsed: Yes
Expiration Date: 6/2026
Name on Card: Will Cheever

EMCO Enterprises LLC is a wholly owned subsidiary of Andersen Corporation. EMCO manufactures and supports the limited warranties of Andersen and EMCO storm doors. "Andersen", "EMCO" and all other marks where denoted are trademarks of Andersen Corporation.

Feedback

Chat with an Expert

CITY OF PORTLAND, MAINE
389 CONGRESS STREET
PORTLAND, ME 04101

Questions on your bill?
Please call: **(207) 874-8660** or Email: swbill@portlandmaine.gov
Questions on your impervious surface or credits?
Please call: **(207) 874-8462.**

# STORMWATER BILL
## QUARTERLY STORMWATER CHARGE

| | |
|---|---|
| ACCOUNT NUMBER: | **708094** |
| BILL NUMBER: | **477080** |
| BILL DATE: | **11/03/2025** |
| DUE DATE: | **11/25/2025** |

CHEEVER WILBUR D JR
38 WILLIAM ST
PORTLAND, ME 04103

CITY OF PORTLAND, MAINE
389 CONGRESS STREET
PORTLAND, ME 04101

Questions on your bill?
Please call: **(207) 874-8660** or Email: swbill@portlandmaine.gov
Questions on your impervious surface or credits?
Please call: **(207) 874-8462.**

STORMWATER BILL
QUARTERLY STORMWATER CHARGE

ACCOUNT NUMBER: 708094
BILL NUMBER: 425068
BILL DATE: 05/01/2025
DUE DATE: 05/25/2025

CHEEVER WILBUR D JR
38 WILLIAM ST
PORTLAND, ME 04103

$280
225 + tax

| CUSTOMER NAME | CUSTOMER # | PARCEL ID | PROPERTY LOCATION |
|---|---|---|---|
| CHEEVER WILBUR D JR | 208258 | 117-C-019-001 | 72 WILLIAM ST |

| DESCRIPTION | AMOUNT |
|---|---|
| QUARTERLY STORMWATER CHARGE | $69.75 |

| BUILDING | IMPERVIOUS AREA SURFACE | TOTAL |
|---|---|---|
| 2129 | 1738 | 3867 |

| BILLABLE UNITS | DWELLINGS | BILLABLE RATE |
|---|---|---|
| 3 | 1 | $7.75/month |

| | |
|---|---|
| Current Charges | **$69.75** |
| Previous Balance | **$0.00** |
| Adjustments | **$0.00** |
| Interest | **$0.00** |
| Penalties | **$0.00** |
| **Total Amount Due** | **$69.75** |

*Current charge is calculated as follows:*
*Billable units divided by Dwellings multiplied by Billable Rate less any Stormwater Credit.*
**Accounts with billing units between 1&2**
*Effective July 1-Invoices mailed TWICE/year*
Service Period: 4/1/2025 to 6/30/2025
Payments are not accepted over the phone.

$69.75 autopay BB

PAY YOUR BILL ONLINE AT: PORTLANDMAINE.GOV/STORMWATERBILLING

# Central Maine Power

An Avangrid company

Manage your account online: **cmpco.com**
Customer Service: **800.750.4000**
Outage reporting line: **800.696.1000**

| Account Number | Service Location | Amount Due | Date Due |
|---|---|---|---|
| **3501-0813-232** | WILL CHEEVER<br>72 WILLIAM ST<br>PORTLAND ME 04104 | **$61.13** | **02/09/2026** |

Invoice Number
701002855586

## Your Messages

The average residential **CMP Delivery** amount includes about $15 per month in non-CMP costs to support Maine public policy initiatives including net energy billing subsidies, low income assistance and energy efficiency. Learn more about CMP rates and public policy costs at **cmpco.com/PublicPolicyCosts**.

If you're struggling to manage your electricity bill, our variety of assistance programs are designed to help you stay connected and regain control. You may be eligible for the Arrearage Management Program or Electricity Lifeline Program. View our complete list of programs and services designed to help at cmpco.com/HelpWithBill or call us at 800.750.4000.

On January 1, the CMP delivery rate, approved by the Maine Public Utilities Commission, changed. For more information about this price change and how it affects your rate, please visit cmpco.com/Pricing.

Thank you for choosing AutoPay - our most convenient payment option. Your payments are made automatically, on time every month. There is no need to send payment with this bill.

Take the guesswork out of your electricity bill with Usage Alerts. You'll get weekly updates from your smart meter, so you know how much electricity you're using long before your bill arrives. Set your own usage target and get notified before costs add up. Sign up at cmpco.com/MyAccount today.

## Your Account Summary

| | |
|---|---|
| **Prior Balance** | **$56.08** |
| Payments received through 01/14/2026 - Thank you | -$56.08 |
| **Balance Forward** | **$0.00** |
| **CMP Delivery** | **+$43.72** |
| ***Non-CMP Supplier Standard Offer*** | **+$17.41** |
| **Please pay by 02/09/2026** | **$61.13** |

BSB
2/4/26

2025
$157

## Your Monthly Billed Usage Summary(kWh)

Your next meter reading is on or about 02/09/2026




| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ■ 2026 | 5 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| □ 2025 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5 | 5 | 4 | 4 |
| □ 2024 | 4 | 4 | 4 | 4 | 4 | 3 | 3 | 3 | 0 | 0 | 0 | 0 |

**Your Average Daily Billed Usage (kWh)**

---

Please return this stub with your payment. Please allow 7 to 10 business days for processing. Do not send cash or coins, and do not return with staples or paper clips. Thank you.

Central Maine Power
PO Box 847810
Boston, MA 02284-7810

WILL CHEEVER
C/O WILL CHEEVER
38 WILLIAM ST
PORTLAND ME 04103

| Account Number |
|---|
| 3501-0813-232 |
| **Date Due** |
| 02/09/2026 |
| **Amount Due** |
| $61.13 |
| **Amount Paid** |
| |

Please do not write below this line.

1002092600350108132320000006113

2913551

002548 (1:1)

Portland Water District
From Sebago Lake to Casco Bay

| | |
|---|---|
| Customer Name | WILBUR CHEEVER |
| Service Address | 72 WILLIAM ST PORTLAND |

| Account Number |
|---|
| 30010229 |

**Bill Date: 01/09/2026** — **Payment Due Upon Receipt**

**Office Hours**
**8:00 a.m. - 4:30 p.m.**
**Monday through Friday**
**Phone: 207-761-8310**

**Web Site and E-Mail**
**www.pwd.org**
**customerservice@pwd.org**

| Account Detail | Member Water Charges | Portland Wastewater Charges | Total |
|---|---|---|---|
| Previous Balance | | | $105.18 |
| Payment - Thank You | | | $105.18CR |
| Balance Forward | | | $0.00 |
| Total Current Charges | $24.16 | $65.00 | $89.16 |
| TOTAL AMOUNT DUE | | | $89.16 |

| Current Charges Detail | | |
|---|---|---|
| Minimum Charge | $12.08 | $13.00 |
| Usage Charge | $12.08 | $52.00 |

DIRECT PAYMENT - DO NOT PAY

**Monthly Usage**
(Hundred Cubic Feet)

| Month | Days | Water | Waste Water |
|---|---|---|---|
| 01/26 | 27 | 5.00 | 5.00 |
| 12/25 | 29 | 6.00 | 6.00 |
| 11/25 | 33 | 8.00 | 8.00 |
| 10/25 | 30 | 8.00 | 8.00 |
| 09/25 | 33 | 8.00 | 8.00 |
| 08/25 | 29 | 8.00 | 8.00 |
| 07/25 | 33 | 8.00 | 8.00 |
| 06/25 | 29 | 7.00 | 7.00 |
| 05/25 | 23 | 3.00 | 3.00 |
| 04/25 | 32 | 8.00 | 8.00 |
| 03/25 | 29 | 6.00 | 6.00 |
| 02/25 | 37 | 7.00 | 7.00 |
| 01/25 | 28 | 8.00 | 8.00 |

Hundred Cubic Feet = 748 Gallons

**Customer Meter Summary:**

| METER NUMBER | METER TYPE | READ DATE | PRIOR READ DATE | CURRENT READING | PRIOR READING | USAGE (HCF) |
|---|---|---|---|---|---|---|
| A17049409 | Primary 5/8" | 12/22/2025 | 11/25/2025 | 2337.00 | 2332.00 | 5.00 |

BSS 1/29/26

2025 Ttl $1420

**Refer to back for customer information, online payment options, or to make mailing address changes.**

Portland Water District
From Sebago Lake to Casco Bay

Remit Total Payment to:

Portland Water District
PO Box 9751
Portland, ME 04104-5051

**BILL DUE UPON RECEIPT**

ACCOUNT NUMBER: 30010229

AMOUNT ENCLOSED _____

DIRECT PAYMENT The total amount due will automatically be deducted from your bank account. Thank You.

**TOTAL AMOUNT DUE: $105.18**

10007650-001737 1737 1 AV 0.584 T6 <B>

WILBUR CHEEVER
38 WILLIAM ST
PORTLAND ME 04103-4828

23001022900000105180

Unitil
ME GAS OPERATIONS

| | |
|---|---|
| Customer | WILBUR CHEEVER |
| Account Number | 5100468500 |
| Bill Date | 01/21/26 |
| Next Meter Read Date | 02/17/26 |

****BANK DRAFT****

| AMOUNT DUE | PLEASE PAY BY |
|---|---|
| $103.22 | 02/17/26 |

72 William St House, Portland CHEE

## OTHER WAYS TO PAY

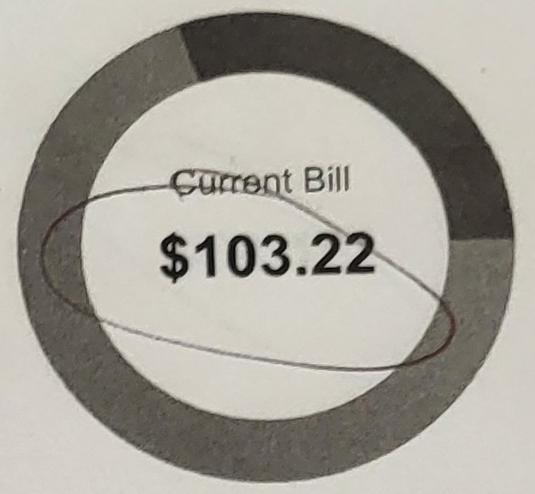
**UNI-PAY BANK DRAFT**
Sign up for automatic bank draft on the back of this bill or online at unitil.com

**ONLINE**
Pay and view your bill using our secure website at myaccount.unitil.com.

**BY PHONE**
Call (888) 301-7700 and follow the prompts.

## BILL SUMMARY

| | |
|---|---|
| Amount of Last Bill | $60.16 |
| Payment - *Thank You* 01/16/26 | ($60.16) |
| Balance Forward | $0.00 |
| Gas Service | $71.99 |
| Gas Supplier Service | $31.23 |




USAGE AND DETAILS ON PAGE 3

BSB
2/2/26

2025
#364

# The Unitil Scholarship Fund

Science, Technology, Engineering and Math (STEM) scholarships are available for the 2026-2027 academic year.

We are happy to announce that we are again offering scholarships for high school students. Six high school seniors from our service territories in New Hampshire, Maine and Massachusetts who are pursuing degrees in engineering, math, science, or technology will each receive $5,000 for the first year of undergraduate study.

Unitil Scholarship Fund guidelines and application for the 2026-2027 academic year are available online at unitil.com/**scholarship**. The deadline to submit your completed application is on or before March 31st and recipients will be notified of selection by email no later than May 1st.

If you have any questions regarding our Unitil Scholarship Fund and the application process, please reach out to us via email at **community@unitil.com**.

STEM
SCIENCE • TECHNOLOGY • ENGINEERING • MATH

Questions about your bill? Visit unitil.com or call (888) 301-7700.
More information on reverse.

Please pay upon receipt and by date listed below to avoid interest charges of 1% per month.

## PAYMENT INFO

Unitil

ACCOUNT NUMBER
**5100468500**

| AMOUNT DUE | PLEASE PAY BY | AMOUNT PAID |
|---|---|---|
| $103.22 | 02/17/26 | BANK DRAFT |

**WILBUR CHEEVER**
**38 WILLIAM ST**
**PORTLAND ME 04103 0000**

GO PAPERLESS - GO GREEN
Take advantage of paperless billing!
More details online at unitil.com/gopaperless

**UNITIL**
**P.O. BOX 981077**
**BOSTON, MA 02298-1077**

8005000005100468500000103229

# MAINE HARDWARE
274 ST. JOHN STREET
PORTLAND, ME 04102-3019
www.mainehardware.com
PHONE: (207) 773-5604
PROUDLY LOCAL, FIERCELY INDEPENDENT
30DAY RETURN POLICY WITH RECEIPT

| CUST NO: | JOB NO: | PURCHASE ORDER: | REFERENCE: | TERMS: | CLERK: | DATE / TIME: |
|---|---|---|---|---|---|---|
| 306764 | 000 | | | NET EOM | MAW | 12/23/25 9:47 |

TERMINAL: 561

SOLD TO:
WDC PROPERTIES LLC
38 WILLIAM STREET

PORTLAND ME 04103

SHIP TO:

SALESPERSON: MA MA
TAX: 001 MAINE STATE SALES TAX

## INVOICE: 145145

2025
joint
#6629

| LINE | SHIPPED | ORDERED | UM | SKU | | SUGG | UNITS | PRICE/ PER | EXTENSION |
|---|---|---|---|---|---|---|---|---|---|
| 1 | 1 | 1 | EA | 9329889 | | 12.99 | 1 | 12.60 /EA | 12.60 |

| | |
|---|---|
| TAXABLE | 12.60 |
| NON-TAXABLE | 0.00 |
| SUBTOTAL | 12.60 |
| TAX AMOUNT | 0.70 |
| **TOTAL** | **13.30** |

** AMOUNT CHARGED TO STORE ACCOUNT ** 13.30

TOT WT: 0.30

X

Received By

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

04/15/2026
License #: **20173494**
Code Case #: **RCC2600550**
Wilbur Cheever /
38 WILLIAM ST
Portland, ME 04103

# AMENDED AND RESTATED
# NOTICE OF VIOLATION AND ORDER TO CORRECT

To Wilbur Cheever,

The City of Portland Permitting and Inspections Department inspected the rental data for **72 WILLIAM ST PORTLAND, ME** on **04/15/2026** and found violations of the City of Portland Code of Ordinances, which are listed on the attached page(s). You are hereby ordered to correct these violations by **05/15/2026**. Please be advised that penalties will be applied if the violations are not corrected by that date.

**NOTE**: The prior Notice of Violation ("NOV") for this property dated March 11, 2026 cited a last code-compliant rent amount of $1,200.00, and a current rent amount of $1,500.00, which this office gathered from the Additional Information form you provided to the Licensing and Registration Department on December 20, 2025. You subsequently indicated that the rental amount was reset to the last code-compliant amount of $1,200 and that you issued a check in the amount of $1,600.00 on March 31, 2026, which was reimbursement for overpayments of $300 per month. On April 6, 2026, this office received a copy of a lease for Unit #3, which stated the rent charged as of April 15, 2025 was $2,100.00, not $1,500.00. Therefore, the reimbursement amount should be $900 per month instead of $300 per month. Based on this new information, the March 11, 2026 NOV is hereby amended and restated to account for the additional overpayments received and reimbursements required as a result of the rent increase violations and to include a violation of Section 6-155 (d).

**The previous Notice of Violation dated March 11, 2026 has been rescinded and is hereby replaced by this Notice of Violation.**

If you do not correct the attached violations by the date given, then this matter will be referred to the City of Portland Corporation Counsel for legal action, and you may be charged $150 for re-inspection per the City's fee schedule. In the event of court action, the City may be entitled to an order to correct the violations, civil penalties in the minimum of $100 per violation per day, costs and fees, and other relief under §1-15 of the City Code and 30-A M.R.S. §4452.

Please respond in writing via email to rentcontrol@portlandmaine.gov or send response by USPS to **389 Congress St, Portland, Maine 04101**.

**You have a right to appeal this decision to Superior Court within 30 days of the date of this notice pursuant to Rule 80B of the Maine Rules of Civil Procedure.**

I appreciate your anticipated cooperation, and please contact our office by calling 207-874-8900 if you have any questions.

Thank you,

---

Wilbur Cheever /
38 WILLIAM ST
Portland, ME 04103

Mercedes Bohaty
Rental Registration Inspectorp

Total Violations: 5

## NON-COMPLIANCE VIOLATION LIST

| | |
|---|---|
| **APPLICABLE CODE SECTION(S)** | City Code 6-155(d) |
| **CODE DESCRIPTION** | Any person, business entity, or other organization providing false information with respect to registration. Notwithstanding the provisions of § 6-1, the penalty for such violation shall be $1,000.00 |
| **COMMENTS** | Owner provided false information on the Additional Information form dated December 12, 2025. A lease dated March 19, 2025 shows the rent being collected for the year of 2025 was $2,100.00. The penalty for such violation is $1,000. |
| **DEADLINE** | 05/15/2026 |

| | |
|---|---|
| **APPLICABLE CODE SECTION(S)** | City Code 6-234(c) |
| **CODE DESCRIPTION** | At no time may a Landlord raise the rent of a Covered Unit by more than ten (10) percent. Any rent increases available to a Landlord in excess of ten (10) percent must be banked for later use. |
| **COMMENTS** | The owner has claimed a rent increase that exceeds 10% of the previous reported rent.<br><br>Unit #3 rent increased on April 15, 2025 from $1,200.00, cited from the 2026 Additional Information as previous rent, to $2,100.00, cited from a lease dated March 19, 2025, resulting in a 75.0% increase. |
| **DEADLINE** | 05/15/2026 |

| | |
|---|---|
| **APPLICABLE CODE SECTION(S)** | Remedy - City Code Sec 6-234(f) |
| **CODE DESCRIPTION** | A landlord who is not in substantial compliance with any provision of this chapter, including but not limited to the Rent Stabilization Ordinance, may not demand, accept or retain any rent increase otherwise permitted by this section or any other provision of this Code or Maine statute. |
| **COMMENTS** | The owner is ordered to reduce the rent to the last code-compliant amount of $1,200.00 and reimburse the tenant(s) any overcharge.<br><br>Proof of resolution must be sent in writing. Resolution documents can be sent via USPS to 389 Congress Street, Room 302, Portland, ME 04101 or electronically via to rentcontrol@portlandmaine.gov |
| **DEADLINE** | 05/15/2026 |

---

Wilbur Cheever /
38 WILLIAM ST
Portland, ME 04103

Wilbur Cheever /
38 WILLIAM ST
Portland, ME 04103

Wilbur Cheever /
38 WILLIAM ST
Portland, ME 04103

# City of Portland — Housing Safety Division

## RENT INCREASE APPLICATION – MAINTENANCE OF NET OPERATING INCOME

**Date of Hearing:**

April 22, 2026

**Owner Name and Address:**

Wilbur Cheever
38 William St, Portland, ME 04103

**Property Address:**

76 William St, all 3 units

**CBL:**

117-C-017-001

**Tenants/Interested Parties:**

Yes

# 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)].
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.

March 31, 2026

Dear Rent Board,

I have owned both my properties for more than 30 years and strive to provide safe, quality housing at a reasonable value. I attempt to keep my rents below market, provide exceptional service and take pride in the spaces my tenants live in.

My starting point for the base rent for both buildings is low mostly due to the fact I had not raised my rents along with the rate the rents were getting inflated all over the city during the two decades prior. I try to only raise my tenants' rents every 3-5 years so I got caught on the low side of this rapid market inflation. This is my basis for asking for the base rent of 2019 to be elevated in both buildings. I had historically used the change in tenancy to bring my leases up closer to market rate which as I understand can't happen without first submitting a request along with the 28 page MNOI form filled out and handed in.

In 72 William St. I have invested $206,000 in completely rehabbing all three units and updating the exterior over the past five years. At the end of the day I am asking the rent board to look at if I can be closer to market rate for all three units and allow me to recoup on my investment improving all three units making them safer and more comfortable spaces to live in.

At 76 William St. I changed the 2nd floor from a one bedroom to a two bedroom to accommodate a long term tenant's life change. With this change I'm asking the rent board to change the base rate of this unit more significantly than the other two units, although their base rent rates should be elevated as well. How do I update/change this apartment from a one bedroom to a two bedroom listing?

I do apologize for being naive and thinking I could invest in improving the spaces between long term tenants and using that timing and expense to bring the rents up to market rates. I didn't understand the MNOI process (still struggling with it but trying) as the vehicle to present to the rent board for changing the rates for each unit.

I understand you are attempting to be transparent and fair while encouraging landlords to invest in keeping their properties safe places to live. Unfortunately for myself and my tenants the process is cumbersome and difficult to navigate. I have done my best to provide the information you ask for and follow the intricate computations. All my documentation for costs of goods and services is in stored paper invoices and statements which is hard to put in any other format than handing you a box with these documents in them.

Thanks-

Will Cheever

General Information About the Property

Street Address: 76 William St.

Parcel Numbers(s): 117-G-17

Year Property Purchased by Current Owner: 1997

Total Number of Units on the Property: 3

Total Number of Units Affected by Proposed Rent Increase: 3

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

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

## Section 1. Landlord Information

Name: Will Cheever

Phone(s): 207-831-0486

Business Address: 38 William St

City, State, Zip: Portland, ME 04103

Business E-mail: wdcheever@gmail.com

## Section 2. Agent Information (if applicable)

Name: _____

Phone(s): _____

Business Address: _____

City, State, Zip: _____

Business E-mail: _____

## Section 3. 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: | ☐ | ☐ | ☐ |

## Section 4. 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.

Second floor changed to 2 bedroom from 1 bedroom July 1st, 2026

heat, hot water, off street parking, on site laundry all included w/ rent

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

## Section 5. 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)

## Section 6. 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 19, 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 18 of this Application.**

## Section 7. Income Worksheet

| | Base Year (2019)[1] | Current Year (2025) |
|---|---|---|
| **Rental Income** | | |
| 1. Gross scheduled rental income (total for the calendar year) including uncollected rent. | $ 36,700 | $ 45,900 |
| 2. Portion Attributable to Vacancy | $ 3350 | $ |
| **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) | $ 36,700 | $ 45,900 |

[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.

## Section 8. Operating Expense Worksheet

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

| | Base Year (2019) | Current Year (2025) |
|---|---|---|
| 1. Assessments | $ | $ |
| 2. Real Property Taxes | $ 6458 | $ 8222 |
| 3. License Tax/Fee | $ | $ |
| 4. Rent Board Registration Fees | $ 98 | $ 98 |
| 5. Insurance | $ 1797 | $ 2250 |
| 6. Accounting | $ | $ |
| 7. Legal (explain types of legal expenses) | $ | $ |
| 8. Manager /Management Services | $ | $ |
| 9. Security | $ | $ |
| 10. Office Supplies | $ | $ |
| 12. Normal Repairs | $ 3683 | $ 11,633 |
| 13. Owner-Performed Labor | $ 500 | $ 6630 |
| 14. Plumbing Maintenance | $ | $ |
| 15. Pool Maintenance | $ | $ |
| 16. Landscape Maintenance/snow removal | $ 2302 | $ 2675 |
| 17. Other Maintenance | $ | $ |
| 18. Parking Lot/Street Maintenance | $ | $ |
| 19. Gas (separately metered only) | $ 5525 | $ 6391 - All utilities |
| 20. Electricity (separately metered only) | $ | $ |
| 21. Water | $ | $ |
| 22. Sewer | $ | $ |
| 23. Amortized portion of Capital Expense (see Sections 10, 11 and 12 column (i)) | $ | $ 2614 |
| 24. Vandalism Repairs | $ | $ |
| 25. Uninsured Damages | $ | $ |
| **27. TOTAL OPERATING EXPENSES** | $ 25,573 | $ 40,503 |

## Section 9. 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 11, 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 |

## Section 10. 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.

## Section 11. Interest Allowance on Capital Improvements

If an amount was reported as an amortized portion of expenses on Section 11, 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) 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 Base Year [add amounts in column (d)]: $ _____

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

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) 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 |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 2nd Floor 2025 windows | 1 | $ 911 | 8.38% | 10 | $ 437 | $ 1348 | $ 135 | $ 11 | $ 11 2nd |
| 2 | 1st Floor 2024 windows | 1 | $ 3515 | 8.39% | 10 | $ 1688 | $ 5203 | $ 520 | $ 43 | $ 43 1st |
| 3 | 2023 water-wise windows | 3 | $ 1932 | 8.38% | 10 | $ 852 | $ 2784 | $ 293 | $ 24 | $ 8 |
| 4 | 2021 roof insulation paving | 3 | $ 11,257 | 8.32% | 10 | $ 5405 | $ 16,662 | $ 1666 | $ 139 | $ 46 |
| | | | $ | % | | $ | $ | $ | $ | $ |
| | | | $ | % | | $ | $ | $ | $ | $ |

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

Total for Current Year [add amounts in column (d)]: $ 17,665

Annual Cost for Current Year [add amounts in column (i)]: $ 2614

Section 12. Blank Worksheet (Optional – Available for Petitioner Use)

## Section 13. 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 |
|---|---|---|---|---|
| 1/1/19-12/31/19 | 104 | 50 | 3 | rent collection, admin, service calls |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Owner Performed Labor – Current Year

| Date | Hours | Hourly Rate | Units Impacted | Type of Work |
|---|---|---|---|---|
| 1/1/25 | 104 | 65 | 3 | rent collection, admin, service calls |
| | | | | |
| | | | | |
| | | | | |

## Section 14. 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) Item # | (b) Brief Description and Expected Date of Completion | (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.

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

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

## Section 15. Net Operating Income (NOI)

Net Operating Income = Income – Operating Expenses

| | Base Year (2019) | Current Year (2025) |
|---|---|---|
| 1. Total Annual Income | $36,700 | $45,100 |
| 2. Annual Operating Expenses | $25,573 | $40,503 |
| 3. Net Annual Operating Income | $11,127 | $5317 |
| 4. CPI [Annual Average CPI] | 281.082 | 346.889 |

5. Percent Annual Increase in CPI Base Year to Current Year

$$\frac{\text{Line 4 Current Year-Line 4 Base Year}}{\text{Line 4 Base Year}} \times 100$$

23.41 %

6. Fair Net Annual Operating Income = Base Year Net Operating Income Adjusted by CPI Increase

$$\frac{\text{Line 5} + 100}{100} \times \text{Line 3 Base Year}$$

$ 13,732

7. Fair Net Annual Operating Income Minus Current Net Operating Income = Allowable Rent Increase

$$\text{Line 6} - \text{Line 3 Current Year}$$

$ 2695

8. Allowable Rent Increase/Unit/Month[3]

$$\text{Line 7} \div 12 \div \text{\# of Units}$$

$ 72

[3] If applied equally per unit. The Landlord may propose to allocate using a different rational basis. To detail a different allocation, complete Section 18 Proposed Adjustment Worksheet.

## Section 16. 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 | $ 1500 | $ | | % | % | $ | |
| 2 | $ 1325 | $ | 7/1/25 | % | % | $ | changed to 2 bedroom |
| 3 | $ 1000 | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |
| | $ | $ | | % | % | $ | |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |
| ___ | $_____ | $_____ | _____ | _____ % | _____ % | $ _____ | _____ |

## Section 17. 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: _____

| 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 | $ 1200 | 09/01/2024 | $ 1500 | | $ 1500 | $ | $ 1500 |
| 2 | $ 1250 | 07/01/2025 | $ 1500 | | $ | $ 1500 | $ 1700 |
| 3 | $ 950 | 02/01/2019 | $ 950 | 03/01/2023 | $ | $ | $ 1500 |
| | $ | | $ | | $ | $ | $ |
| | $ | | $ | | $ | $ | $ |
| | $ | | $ | | $ | $ | $ |
| | $ | | $ | | $ | $ | $ |
| | $ | | $ | | $ | $ | $ |
| | $ | | $ | | $ | $ | $ |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |
| ___ | $ _____ | _____ | $ _____ | _____ | $ _____ | $ _____ | $ _____ | |

## Section 18. 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 19 and the following Sections 20 and 21 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 20 will be performed with an Adjusted Gross Income, and that will be substituted for the Section 16 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: $ 36700

Proposed Adjusted Gross Income for 2019: $ 50,400

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.

rates for each apartment well below market for the neighborhood

1500
1500
1200
4200

## Section 19. Income and Operating Expense Worksheet With Adjustment of Base Year

| | Base Year (2019) | Current Year (2025) |
|---|---|---|
| **Rental Income** | | |
| 1. Adjusted Gross Income (with Adjusted Base Year as proposed in Section 19) | $ 50,400 | $ 53,424 |
| 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) | $ 50,400 | $ 53,424 |

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

## Section 20. Calculation of Fair Return Rent Adjustment with Adjustments of Base Year Amount

Complete only if seeking an adjustment of base year rent.

proposed

| | Base Year (2019) | Current Year (2025) |
|---|---|---|
| 1. Total Annual Income | $ 50,400 | $ 53,424 |
| 2. Annual Operating Expenses | $ 25,573 | $ 40,503 |
| 3. Net Annual Operating Income | $ 24,827 | $ 12,921 |
| 4. CPI [Annual Average CPI] | 281.082 | 346.889 |

5. Percent Annual Increase in CPI Base Year to Current Year

$$\frac{\text{Line 4 Current Year-Line 4 Base Year}}{\text{Line 4 Base Year}} \times 100$$

23.41 %

6. Fair Net Annual Operating Income = Base Year Net Operating Income Adjusted by CPI Increase

$$\frac{\text{Line 5} + 100}{100} \times \text{Line 3 Base Year}$$

$ 30,637

7. Fair Net Annual Operating Income Minus Current Net Operating Income = Allowable Rent Increase

$$\text{Line 6} - \text{Line 3 Current Year}$$

$ 5912

8. Allowable Rent Increase/Unit/Month[6]

$$\text{Line 7} \div 12 \div \text{\# of Units}$$

$ 161

[6] If applied equally per unit. The Landlord may propose to allocate using a different rational basis. To detail a different allocation, complete Section 18 Proposed Adjustment Worksheet.

## Section 21. 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:

# CITY OF PORTLAND

389 CONGRESS ST
PORTLAND, ME 04101

For the fiscal year July 01, 2019 to June 30, 2020

BILL #: 9436
ACCOUNT #: 15906
CBL: 117-C-017-001
LOCATION: 76 WILLIAM ST

CHRISTIE MARY MARGARET &
WILBUR CHEEVER JTS
45 AUSTIN ST
PORTLAND, ME 04103

Owner of Record as of: April 1, 2019
CHRISTIE MARY MARGARET &
WILBUR CHEEVER JTS

Assessed Property Description:
117-C-17
WILLIAM ST 76

6194 SF
Acres: 0.142

| CURRENT BILL RATE DISTRIBUTION | | |
|---|---|---|
| SCHOOL | 11.690 | $3,558.44 |
| COUNTY | 0.830 | $252.65 |
| MUNICIPAL | 10.790 | $3,284.48 |
| TOTAL | 23.310 | $7,095.56 |

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

## FY20 REAL ESTATE TAX BILL

| BILLING INFORMATION | |
|---|---|
| LAND VALUE | $87,400 |
| BUILDING VALUE | $233,800 |
| TOTAL VALUE | $321,200 |
| EXEMPTIONS | $16,800 |
| TAXABLE VALUE | $304,400 |
| TAX RATE | 23.310 |
| TOTAL TAX | $7,095.56 |
| PAYMENTS/CREDITS | $0.01 |
| TAX DUE | $7,095.55 |

| DATE DUE | AMOUNT DUE |
|---|---|
| 10/18/2019 | $3,547.77 |
| 03/20/2020 | $3,547.78 |

2 4908 →
2 422 →

25450 00

**INTEREST AT 9% PER ANNUM CHARGED BEGINNING 10/19/2019 AND 03/21/2020.**

## 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, 2019.

**IF THIS PROPERTY HAS BEEN TRANSFERED, 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 15.12% higher. The current City and School bonded indebtedness is $319,660,011.**

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.

**CENTRAL MAINE POWER**

Manage your account online: **cmpco.com**
Customer assistance line: **1.800.750.4000**
Outage reporting line: **1.800.696.1000**

| Account Number | Service Location | Amount Due | Date Due |
|---|---|---|---|
| **3501-5333-947** | WILL CHEEVER<br>76 WILLIAM ST HSE MTR<br>PORTLAND ME 04103 | **$23.04** | **02/11/2020** |
| Invoice Number<br>716000671387 | | | |

## Your Messages

We've updated your bill to provide even more usage information – you'll see up to 36 months of usage now! You can access your daily and hourly usage information from your smart meter by enrolling in Energy Manager at cmpco.com/EnergyManager.

Resolve to be energy fit in 2020 - and beyond! Our free products and services can help. Save money on energy costs with Usage Alerts, save energy with Energy Manager, and save time with eBill and AutoPay. Visit cmpco.com today to learn how you can start saving now.

*Understanding how your energy dollars are spent can help you make decisions about how you use energy in your home. Energy Manager and Usage Alerts can help you figure out your energy usage, reduce costs and save! Visit cmpco.com today to learn more about these FREE tools.*

*You can pay your bill without lifting a finger with AutoPay. Your secure payment will be made on time automatically each month. Enroll in AutoPay today at cmpco.com and let your bill take care of itself.*

*wered by your smart meter, our FREE Usage rts provide you with weekly energy use ates, an alert if you exceed a set amount of e or cost and notifications of your energy y text, email, phone call or all three. Sign up age Alerts today at cmpco.com and start now.*

## Your Account Summary

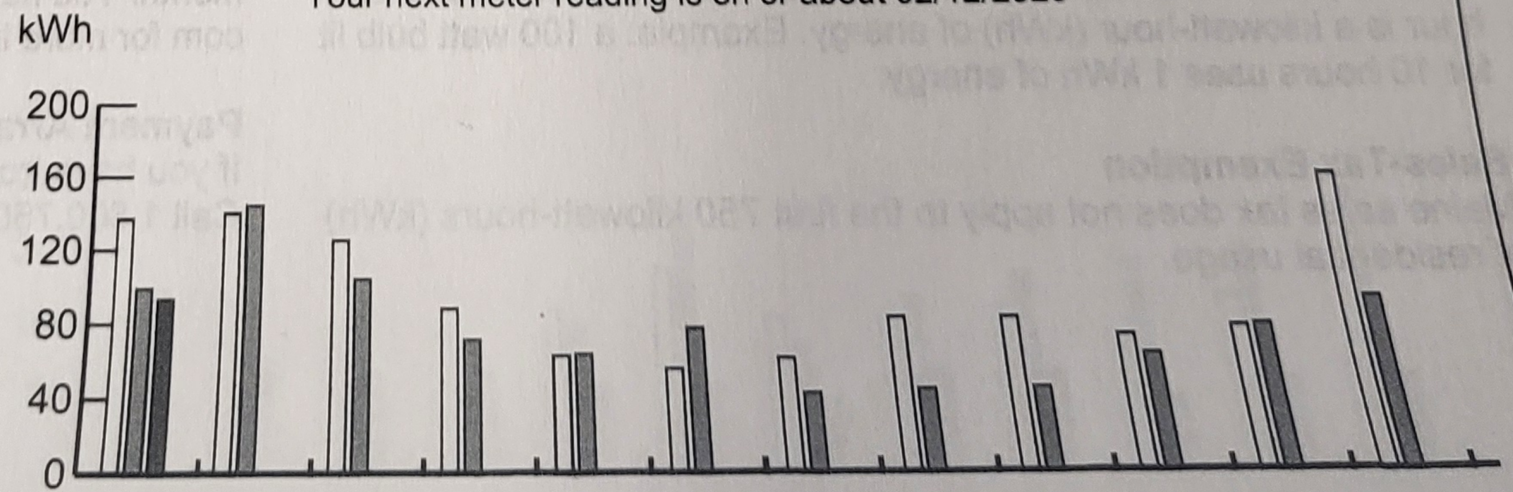
| | |
|---|---|
| **Prior Balance** | **$28.10** |
| Payments received through 01/15/2020 - Thank you | -$28.10 |
| **Balance Forward** | **$0.00** |
| **Electricity Delivery Central Maine Power** | **+$15.35** |
| **Electricity Supply Standard Offer** | **+$7.69** |
| **Please pay by 02/11/2020** | **$23.04** |

2019
$23.04

010236 1/2

## Your Monthly Usage Summary(kWh)

Your next meter reading is on or about 02/12/2020




| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2019 | 3 | 5 | 4 | 2 | 2 | 2 | 1 | 1 | 1 | 2 | 2 | 3 |
| 2018 | 5 | 4 | 4 | 3 | 2 | 2 | 2 | 3 | 3 | 3 | 3 | 5 |

Your Average Daily Usage (kWh)

Description:

| Quantity | Description | Unit Price | Amount |
|---|---|---|---|
| 172.0 | #2 Fuel | $2.529 | $434.99 |

| | |
|---|---|
| Sub Total: | $434.99 |
| Tax Total: | $0.00 |
| Invoice Total: | $434.99 |
| Prev. Balance: | $0.00 |
| USD Total Due: | $434.99 |

***A cash discount of $17.20 can be taken, if paid by 12/10/2019.***

2019
#3526

17.20
$ 417.79
#4330

**We have a new Phone Number 207-352-7800**

*For Fuel or Service At:* Will Cheever
76 William St Tag#4363
Portland, ME 04102

*Lampron Energy*
*PO Box 294 82 Main Street*
*Bridgton, ME 04009*
*207-839-6054*

Account #: 10026361
Invoice #: 25244
Transaction Date: 12/3/19

**Portland Water District**

| Customer Name | CHEEVER WILBER | Account Number |
|---|---|---|
| | | 124873-02 |
| Service Address | 76 WILLIAM ST PORTLAND | |

********** **Payment due by 02/03/2020.** ********** Page 1 of 1

## Account Detail:

| | MEMBER WATER CHARGES | CITY OF PORTLAND* WASTEWATER CHARGES | TOTAL |
|---|---|---|---|
| **PREVIOUS BALANCE** | | | **$110.03** |
| Payment - Thank You | | | $110.03 CR |
| **BALANCE FORWARD** | | | **$0.00** |
| **CURRENT CHARGES** | | | |
| Consumption Charge | $26.83 | $83.20 | $110.03 |
| **Total Current Charges** | **$26.83** | **$83.20** | ~~$110.03~~ |
| **TOTAL AMOUNT DUE** | | | **$110.03** |

2018 $1132

PD 2/3 EFT

**Send Correspondence to:**
**Address:**
225 Douglass St.
P.O. Box 3553
Portland, ME 04104-3553

**Office Hours:**
8:00 a.m. - 4:30 p.m.
Monday through Friday
Phone: 207.761.8310

**Web Site and E-Mail:**
www.pwd.org
customerservice@pwd.org

* *WASTEWATER RATES ARE SET BY THE CITY OF PORTLAND*

YOUR
13 MONTH CONSUMPTION SUMMARY
(Hundred Cubic Feet)

| Month | Water | Waste Water | Days |
|---|---|---|---|
| 01/20 | 08 | 8 | 30 |
| 12/19 | 08 | 8 | 33 |
| 11/19 | 07 | 7 | 30 |
| 10/19 | 09 | 9 | 33 |
| 09/19 | 04 | 4 | 28 |
| 08/19 | 07 | 7 | 31 |
| 07/19 | 04 | 4 | 29 |
| 06/19 | 07 | 7 | 31 |
| 05/19 | 10 | 10 | 35 |
| 04/19 | 05 | 5 | 24 |
| 03/19 | 07 | 7 | 28 |
| 02/19 | 07 | 7 | 29 |
| 12/18 | 06 | 6 | 30 |

*ndred Cubic Feet = 748 Gallons*

## Customer Meter Summary:

**METER TYPE:** **P** = Primary **S** = Submeter **R** = Reverse Submeter **F** = Fireline

| METER NUMBER | METER TYPE | READ DATE | PRIOR READ DATE | BILL DATE | CURRENT METER READING | PRIOR METER READING | CONSUMPTION (HCF) |
|---|---|---|---|---|---|---|---|
| A17049410 | P | 01/03/20 | 12/04/19 | 01/10/20 | 1314 | 1306 | 8 |

## Notes

Unitil
ME GAS OPERATIONS

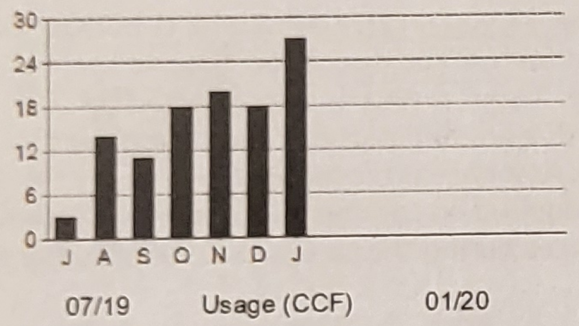
energy for life

# AMOUNT DUE $53.37

| ACCOUNT NUMBER | BILL DATE | PLEASE PAY BY | NEXT METER READING DATE |
|---|---|---|---|
| 5100209503 | 01/21/20 | 02/18/20 | 02/18/20 |

76 WILLIAM ST FL 1, PORTLAND CHEE






## AT A GLANCE

| | | | |
|---|---|---|---|
| AMOUNT OF LAST BILL | $45.03 | TOTAL CURRENT CHARGES | $53.37 |
| PAYMENT - THANK YOU 01/13/20 | ($45.03) | PLEASE PAY AMOUNT | $53.37 |

| METER NUMBER | METER READING PREVIOUS | METER READING PRESENT | METER CONSTANT | METERED USAGE | NUMBER OF DAYS | METERED DEMAND | RATE CODE |
|---|---|---|---|---|---|---|---|
| E59917 | 9469 | 9495 | | 26.00 CCF | 31 | | R1 |

**BALANCE FORWARD** **$0.00**

**GAS SERVICE** PERIOD **12/17/19 - 01/17/20**
26 CCF x 1.04771 = 27.24 THERMS

| | | | | |
|---|---|---|---|---|
| METERED USAGE | | | | 26.20 |
| DELIVERY CHARGES | | | | |
| CUSTOMER CHARGE | | | | 10.49 |
| DISTRIBUTION CHARGE FIRST | 27.24 Therms | x | $0.3848 | 0.16 |
| ERC | 27.24 Therms | x | $0.0059 | |
| **Total Current GA Charges** | | | | **$36.85** |

**GAS SUPPLIER SERVICE** PERIOD **12/17/19 - 01/17/20**

| | | | | |
|---|---|---|---|---|
| SUPPLY CHARGES AT COST | | | | |
| COST OF GAS | 27.24 Therms | x | $0.6069 | 16.52 |
| **Total Current GS Charges** | | | | **$16.52** |

2014
$53.37

## MESSAGES

*Unitil offers a Low-Income Discount Program to all income-eligible heating and non-heating customers identified by the Maine State Housing Authority as eligible for LIHEAP funds and will provide for a 30% discount off the total billed charges. Please visit our website or contact our Customer Service Center for details.*

| | |
|---|---|
| TOTAL CURRENT BILL | $53.37 |
| TOTAL AMOUNT DUE | $53.37 |

fax to: (617) 658-5708 You can include

**CITY OF PORTLAND, MAINE**
389 Congress Street
Portland, ME 04101

Questions on your bill? Please call: **(207) 874-8660**
or email us at: swbill@portlandmaine.gov
Questions on your impervious space or credits? Please call: **(207) 874-8462**

2019 total
$223

RE: 708092
CHRISTIE MARY MARGARET &
WILBUR CHEEVER JTS
38 WILLIAM ST
PORTLAND, ME 04103

# STORMWATER BILL

00 21133 00

ACCOUNT#:
**708092**

DATE:
**10/25/2019**

DATE DUE:
**11/21/2019**

TAX YEAR: **2020** PERIOD: **October - December**

CBL:
**117 C017001**

AMOUNT DUE:
**$75.60**

BILLING CYCLE **QUARTERLY**

| | |
|---|---|
| PROPERTY LOCATION | **76 WILLIAM ST** |
| BUILDING IMPERVIOUS AREA | **2,109** SQ/FT |
| SURFACE IMPERVIOUS AREA | **2,529** SQ/FT |
| TOTAL IMPERVIOUS AREA | **4,638** SQ/FT |
| BILLABLE UNITS (per 1200 sq ft) | **4** |
| PROPERTY DWELLING(S) AT LOCATION | **1** |
| MONTHLY RATE PER BILLABLE UNIT | **$6.30** |

| | |
|---|---|
| OUTSTANDING BALANCE | **$0.00** |
| CURRENT CHARGES (see below) | **$75.60** |
| CREDITS APPLIED | **$0.00** |
| INTEREST CHARGES | **$0.00** |
| TOTAL AMOUNT DUE | **$75.60** |

Current Charge is calculated as follows:
Billable units divided by the property dwelling(s) at location multiplied by the current monthly rate.

R # 483

**PAY YOUR BILL ONLINE AT: PORTLANDMAINE.GOV/STORMWATERBILLING**

| City of Portland<br>389 Congress St, Portland, ME 04101<br>Real Estate Property Tax Statement | | **FY 2019** | For Fiscal Year 2019<br>July 01, 2018 - June 30, 2019 | |
|---|---|---|---|---|
| DUE Sep 21, 2018 | DUE Mar 08, 2019 | AMOUNT PAID | INTEREST DUE | PAY THIS AMOUNT |
| $3,410.22 | $3,410.21 | $3,410.22 | $0.00 | $3,410.21 |

CBL: 117-C-017-001

CHRISTIE MARY MARGARET &
WILBUR CHEEVER JTS
45 AUSTIN ST
PORTLAND, ME 04103

ACCOUNT NUMBER: 15906
ACRES: 0.142
BILL NUMBER: **9328**

Owner of Record as of: April 1, 2018
CHRISTIE MARY MARGARET &

Assessed Property Description:
117-C-17
WILLIAM ST 76
6194 SF

| CURRENT BILLING DISTRIBUTION | | |
|---|---|---|
| Education | $3,376 | 49.50% |
| Public Safety | $1,214 | 17.80% |
| Debt Service | $955 | 14.00% |
| Public Works | $368 | 5.40% |
| County Tax | $239 | 3.50% |
| Rec & Fac Mgmt | $191 | 2.80% |
| Health & Human Svcs | $164 | 2.40% |
| Library | $157 | 2.30% |
| Metro | $102 | 1.50% |
| General Government | $55 | .80% |
| | | 100.00% |

| CURRENT BILLING INFORMATION | |
|---|---|
| Land Value | $87,400 |
| Building Value | $233,800 |
| Total Value | $321,200 |
| Exemptions | $17,800 |
| Taxable Value | $303,400 |
| Tax Rate | 22.48 |
| TOTAL TAX DUE | $3,410.21 |
| AMOUNT PAID | $3,410.22 |

**KEEP THIS PORTION FOR YOUR RECORDS**

**FOR IMPORTANT PAYMENT INFORMATION, PLEASE SEE BACK OF BILL**

# INVOICE

CITY OF PORTLAND
LICENSING & REGISTRATION
389 Congress Street
Portland, Maine 04101
(207) 756-8131



| INVOICE NUMBER | INVOICE DATE | INVOICE DUE DATE | INVOICE STATUS | INVOICE DESCRIPTION |
|---|---|---|---|---|
| INV-00012908 | 10/25/2018 | 12/31/2018 | Due | NONE |

| REFERENCE NUMBER | FEE NAME | TOTAL |
|---|---|---|
| 20173494 | Long Term Rental Registration Fee | $97.50 |
| Wilbur Cheever - 72 William St Portland, ME | SUB TOTAL | $97.50 |

**DISCOUNTS**

3 No Smoking Lease

| INVOICE NUMBER | INVOICE DATE | INVOICE DUE DATE | INVOICE STATUS | INVOICE DESCRIPTION |
|---|---|---|---|---|
| INV-00012783 | 10/25/2018 | 12/31/2018 | Due | NONE |

| REFERENCE NUMBER | FEE NAME | TOTAL |
|---|---|---|
| 20173495 | Long Term Rental Registration Fee | $97.50 |
| Wilbur Cheever - 76 William St Portland, ME | SUB TOTAL | $97.50 |

**DISCOUNTS**

3 No Smoking Lease

**TOTAL** $195.00

**BILLING CONTACT**

WILBUR CHEEVER

45 Austin St
Portland, Me 04103

Make checks payable to the City of Portland, ATTN: Licensing & Registration, 389 Congress Street, Portland, ME 04101

# DWELLING FIRE PREMIUM INVOICE

Billed On: 02/14/2019
Due By: 03/07/2019
Policy Number: 1115578-1
Agent Code: 18-307
Online Access #: 0629272

THE CONCORD GROUP INSURANCE COMPANIES

**REFER BILLING AND POLICY QUESTIONS TO YOUR AGENT**

(207) 856-5500
Anderson-Watkins Associates, Inc.
31 Central St
Westbrook, ME 04092

**MAIL TO:**

Wilbur D. Cheever Jr
45 Austin St
Portland, ME 04103-4514

Policy Account Information

| POLICY NUMBER | POLICY TYPE | POLICY PERIOD | PAYMENT PLAN | PAID TO DATE | UNPAID BALANCE |
|---|---|---|---|---|---|
| 1115578-1 | Dwelling Fire | 03/07/2019 TO 03/07/2020 | 1-Pay | $0.00 | $1,797.00 |

To William

P#4701

*Thank you for your last payment of* $1,742.00 *received on* 02/28/2018

****** Current Payment Transaction ******

CURRENT DUE..... $1,797.00

INSTALLMENT SERVICE CHARGE.. N/A

**MINIMUM AMOUNT DUE..... $1,797.00**

**PLEASE PAY BY 03/07/2019**

**SEE REVERSE SIDE OF INVOICE FOR FURTHER INFORMATION**

***** Future Payment Schedule *****

** No Scheduled Installments at this time **

***Did you know you can pay your premium electronically?***
**Online: www.concordgroupinsurance.com**
**By Phone: 1.800.584.1223**
We accept the following payment types:
***Credit Card (MasterCard, Visa, Discover) *ATM Debit Card ***
***ACH/Electronic Check***

Ways To Save: speak with your independent agent about updating coverages, limits and deductibles, switching to annual, two and four pay plans or updating your insurance score as these changes may reduce the cost of your insurance.

Central Maine Power

An Avangrid company

Manage your account online: **cmpco.com**
Customer Service: **800.750.4000**
Outage reporting line: **800.696.1000**

| Account Number | Service Location | Amount Due | Date Due |
|---|---|---|---|
| **3501-5333-947** | WILL CHEEVER<br>76 WILLIAM ST HSE MTR<br>PORTLAND ME 04103 | **$63.13** | **02/09/2026** |
| Invoice Number<br>720002495120 | | | |

## Your Messages

The average residential **CMP Delivery** amount includes about $15 per month in non-CMP costs to support Maine public policy initiatives including net energy billing subsidies, low income assistance and energy efficiency. Learn more about CMP rates and public policy costs at **cmpco.com/PublicPolicyCosts**.

If you're struggling to manage your electricity bill, our variety of assistance programs are designed to help you stay connected and regain control. You may be eligible for the Arrearage Management Program or Electricity Lifeline Program. View our complete list of programs and services designed to help at cmpco.com/HelpWithBill or call us at 800.750.4000.

On January 1, the CMP delivery rate, approved by the Maine Public Utilities Commission, changed. For more information about this price change and how it affects your rate, please visit cmpco.com/Pricing.

Thank you for choosing AutoPay - our most convenient payment option. Your payments are made automatically, on time every month. There is no need to send payment with this bill.

Take the guesswork out of your electricity bill with Usage Alerts. You'll get weekly updates from your smart meter, so you know how much electricity you're using long before your bill arrives. Set your own usage target and get notified before costs add up. Sign up at cmpco.com/MyAccount today.

## Your Account Summary

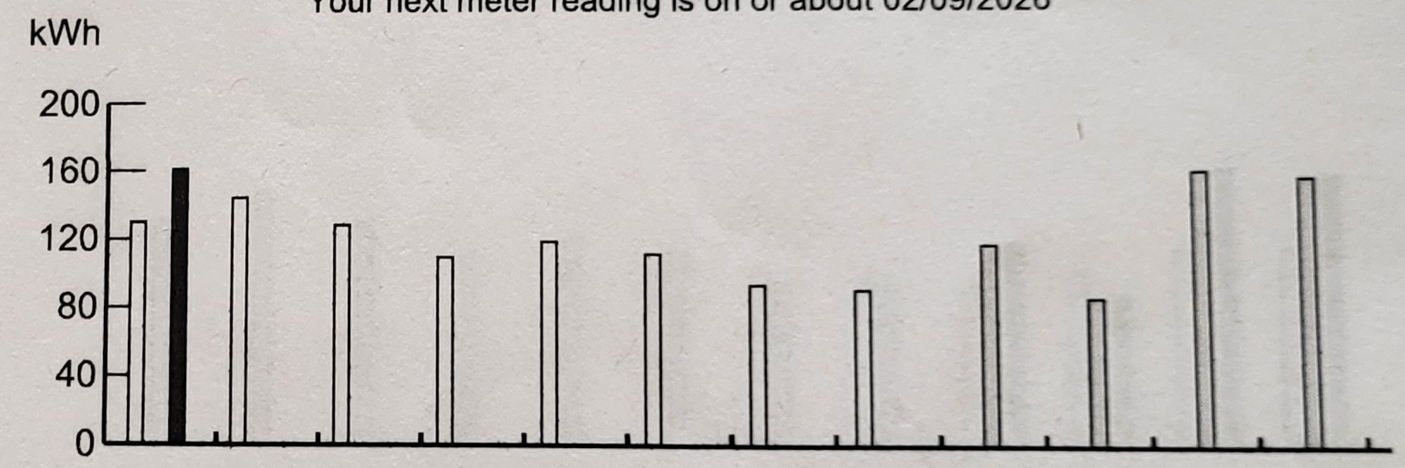
| | |
|---|---|
| **Prior Balance** | **$60.11** |
| Payments received through 01/14/2026 - Thank you | -$60.11 |
| **Balance Forward** | **$0.00** |
| **CMP Delivery** | **+$44.79** |
| ***Non-CMP Supplier Standard Offer*** | **+$18.34** |
| **Please pay by 02/09/2026** | **$63.13** |

2/4/26
RSB

2025 total $467

## Your Monthly Billed Usage Summary(kWh)

Your next meter reading is on or about 02/09/2026




| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2026 | 5 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2025 | 0 | 0 | 0 | 0 | 0 | 0 | 0* | 0 | 4 | 3 | 5 | 5 |
| 2024 | 4 | 5 | 4 | 4 | 4 | 4 | 3* | 3 | 0 | 0 | 0 | 0 |

**Your Average Daily Billed Usage (kWh)** *Estimated Reading

Please return this stub with your payment. Please allow 7 to 10 business days for processing. Do not send cash or coins, and do not return with staples or paper clips. Thank you.

Central Maine Power
PO Box 847810
Boston, MA 02284-7810

WILL CHEEVER
C/O WILL CHEEVER
38 WILLIAM ST
PORTLAND ME 04103

| Account Number |
|---|
| 3501-5333-947 |
| **Date Due** |
| 02/09/2026 |
| **Amount Due** |
| $63.13 |
| **Amount Paid** |
| |

Please do not write below this line.

1002092600350153339470000006313

Unitil
ME GAS OPERATIONS

| | |
|---|---|
| Customer | WILBUR CHEEVER |
| Account Number | 5100209503 |
| Bill Date | 02/20/25 |
| Next Meter Read Date | 03/20/25 |

| AMOUNT DUE | PLEASE PAY BY |
|---|---|
| $605.74 | 03/17/25 |

## OTHER WAYS TO PAY

**UNI-PAY BANK DRAFT**
Sign up for automatic bank draft on the back of this bill or online at unitil.com

**ONLINE**
Pay and view your bill using our secure website at myaccount.unitil.com.

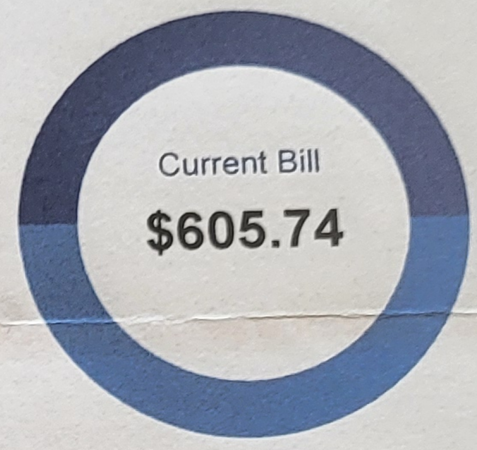
**BY PHONE**
Call (888) 301-7700 and follow the prompts.

## BILL SUMMARY

76 William St Fl 1, Portland CHEE

| | |
|---|---|
| Amount of Last Bill | $502.67 |
| Payment - *Thank You* 02/18/25 | ($502.67) |
| Balance Forward | $0.00 |

| | |
|---|---|
| Gas Service | $303.85 |
| Gas Supplier Service | $301.89 |




USAGE AND DETAILS ON PAGE 3

2025
total
$605.42

3/24/25
8133529033

# Financial Assistance

Support for your energy needs.

unitil.com/**financial-assistance**

### Payment Plans

*The unexpected can happen to any of us. If you fall behind on your account, our Customer Service Team can help create a personalized plan to get you back on track.*

### Budget Billing

Our residential customers can enjoy the convenience of our Budget Billing Program. This program helps distribute your payments evenly throughout the year to avoid fluctuating costs.

### Find State-Specific Programs

Local and state organizations in our service areas offer highly supportive programs for qualified customers to increase energy efficiency and manage energy costs.

UB250220_1.XML-775-000000272

Questions about your bill? Visit unitil.com or call (888) 301-7700.
More information on reverse.

Please pay upon receipt and by date listed below to avoid interest charges of 1% per month.

## PAYMENT INFO

000388 000000272

WILBUR CHEEVER
38 WILLIAM ST
PORTLAND ME 04103 0000

234

GO PAPERLESS - GO GREEN
Take advantage of paperless billing!
More details online at unitil.com/gopaperless

Unitil

ACCOUNT NUMBER
**5100209503**

| AMOUNT DUE | PLEASE PAY BY | AMOUNT PAID |
|---|---|---|
| $605.74 | 03/17/25 | |

UNITIL
P.O. BOX 981077
BOSTON, MA 02298-1077

800500000510020950300000605749

2856195

| Customer Name | WILBUR CHEEVER | Account Number |
|---|---|---|
| | | 30010348 |
| Service Address | 76 WILLIAM ST PORTLAND | |

001742 (1:1)

2971744

Portland Water District
*From Sebago Lake to Casco Bay*

| Customer Name | WILBUR CHEEVER | Account Number |
|---|---|---|
| | | 30010348 |
| Service Address | 76 WILLIAM ST PORTLAND | |

000353 (1:1)

**Bill Date: 02/13/2026** **Payment Due Upon Receipt**

**Office Hours**
**8:00 a.m. - 4:30 p.m.**
**Monday through Friday**
**Phone: 207-761-8310**

**Web Site and E-Mail**
**www.pwd.org**
**customerservice@pwd.org**

**Monthly Usage**
(Hundred Cubic Feet)

| Month | Days | Water | Waste Water |
|---|---|---|---|
| 02/26 | 37 | 14.00 | 14.00 |
| 01/26 | 27 | 12.00 | 12.00 |
| 12/25 | 29 | 12.00 | 12.00 |
| 11/25 | 33 | 11.00 | 11.00 |
| 10/25 | 30 | 10.00 | 10.00 |
| 09/25 | 33 | 13.00 | 13.00 |
| 08/25 | 29 | 13.00 | 13.00 |
| 07/25 | 33 | 14.00 | 14.00 |
| 06/25 | 29 | 9.00 | 9.00 |
| 05/25 | 23 | 9.00 | 9.00 |
| 04/25 | 32 | 12.00 | 12.00 |
| 03/25 | 29 | 12.00 | 12.00 |
| 02/25 | 37 | 14.00 | 14.00 |

Hundred Cubic Feet = 748 Gallons

| Account Detail | Member Water Charges | Portland Wastewater Charges | Total |
|---|---|---|---|
| Previous Balance | | | $201.30 |
| Payment - Thank You | | | $201.30CR |
| Balance Forward | | | $0.00 |
| Total Current Charges | $53.80 | $182.00 | $235.80 |
| TOTAL AMOUNT DUE | | | $235.80 |

2025 total
$2600

| Current Charges Detail | | | |
|---|---|---|---|
| Minimum Charge | $12.67 | $13.00 | |
| Usage Charge | $41.13 | $169.00 | |

DIRECT PAYMENT - DO NOT PAY

**Customer Meter Summary:**

| METER NUMBER | METER TYPE | READ DATE | PRIOR READ DATE | CURRENT READING | PRIOR READING | USAGE (HCF) |
|---|---|---|---|---|---|---|
| A17049410 | Primary 5/8" | 01/28/2026 | 12/22/2025 | 2071.00 | 2057.00 | 14.00 |

RSS

3/5/26

10007650-001742 1742 1 AV 0.584 T6 <B>

WILBUR CHEEVER
38 WILLIAM ST
PORTLAND ME 04103-4828

DIRECT PAYMENT The total amount due will automatically be deducted from your bank account. Thank You.
**TOTAL AMOUNT DUE: $201.30**

23001034800000201305

2025 total 76 William

$ 7590

# INVOICE

**Darling Plumbing & Heating Inc**
29 Vannah Ave
Portland, ME 04103

darlingph@aol.com
+1 (207) 773-9525

**Bill to**
CHEEVER,WILL
MR. WILL CHEEVER
38 WILLIAM ST
PORTLAND, ME 04103

**Ship to**
CHEEVER,WILL
MR. WILL CHEEVER
38 WILLIAM ST
PORTLAND, ME 04103

**Invoice details**
Terms: Due on receipt
Invoice date: 12/23/2025
Due date: 12/23/2025

P.O. Number: 36452

| # | Date | Product or service | Description | Qty | Rate | Amount |
|---|---|---|---|---|---|---|
| 1. | | 1 | INSTALLATION OF KITCHEN SINK PLUMBING | 1 | $0.00 | $0.00 |
| 2. | | LS1 | SERVICE CALL | 1 | $135.00 | $135.00 |
| 3. | | 1 | BASKET STRAINER | 1 | $25.00 | $25.00 |
| 4. | | 1 | 11/2 PVC DESANCO | 1 | $6.35 | $6.35 |
| 5. | | 1 | 11/2 PVC LONG SWEEP | 1 | $4.00 | $4.00 |
| 6. | | 1 | 11/2 PVC P-TRAP | 1 | $8.00 | $8.00 |
| 7. | | 1 | 11/2 PVC PIPE | 1 | $2.00 | $2.00 |

**Total** **$180.35**

## Ways to pay

VISA DISCOVER AMEX BANK PayPal venmo

View and pay

1/9/26
CSB
KHTC-M31XX

# CITY OF PORTLAND

389 CONGRESS ST
PORTLAND, ME 04101

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

BILL #: 2504470
ACCOUNT #: 9849
PARCEL ID #: 117-C-017-001
LOCATION: 76 WILLIAM ST

CHEEVER WILBUR D JR
38 WILLIAM ST
PORTLAND, ME 04103

Owner of Record as of: April 1, 2024
CHEEVER WILBUR D JR

## FY25 REAL ESTATE TAX BILL

| CURRENT BILL RATE DISTRIBUTION | | |
|---|---|---|
| SCHOOL | 7.880 | $4,316.66 |
| COUNTY | 0.560 | $306.77 |
| MUNICIPAL | 6.570 | $3,599.05 |
| TOTAL | 15.010 | $8,222.48 |

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

| BILLING INFORMATION | |
|---|---|
| LAND VALUE | $92,900 |
| BUILDING VALUE | $454,900 |
| TOTAL VALUE | $547,800 |
| EXEMPTIONS | $0 |
| TAXABLE VALUE | $547,800 |
| TAX RATE | 15.010 |
| TOTAL TAX | $8,222.48 |
| PAYMENTS/CREDITS | $0.00 |
| ABATEMENT/ADJUST | $0.00 |
| TAX DUE | $8,222.48 |

| DATE DUE | AMOUNT DUE |
|---|---|
| 10/18/2024 | $4,111.24 |
| 03/14/2025 | $4,111.24 |

Assessed Property Description:
117-C-17
WILLIAM ST 76
6194 SF
Acres: 0.142

**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, MAINE
389 CONGRESS STREET
PORTLAND, ME 04101

Questions on your bill?
Please call: **(207) 874-8660** or Email: swbill@portlandmaine.gov
Questions on your impervious surface or credits?
Please call: **(207) 874-8462.**

# STORMWATER BILL
## QUARTERLY STORMWATER CHARGE

| | |
|---|---|
| ACCOUNT NUMBER: | 708092 |
| BILL NUMBER: | 401765 |
| BILL DATE: | 02/03/2025 |
| DUE DATE: | 02/25/2025 |

CHEEVER WILBUR D JR
38 WILLIAM ST
PORTLAND, ME 04103

$379 2025 tdl

| CUSTOMER NAME | CUSTOMER # | PARCEL ID | PROPERTY LOCATION |
|---|---|---|---|
| CHEEVER WILBUR D JR | 208256 | 117-C-017-001 | 76 WILLIAM ST |

| DESCRIPTION | AMOUNT |
|---|---|
| QUARTERLY STORMWATER CHARGE | $93.00 |

| BUILDING | IMPERVIOUS AREA SURFACE | TOTAL |
|---|---|---|
| 2109 | 2529 | 4638 |

| BILLABLE UNITS | DWELLINGS | BILLABLE RATE |
|---|---|---|
| 4 | 1 | $7.75/month |

| | |
|---|---|
| Current Charges | $93.00 |
| Previous Balance | $0.00 |
| Adjustments | $0.00 |
| Interest | $0.00 |
| Penalties | $0.00 |
| **Total Amount Due** | **$93.00** |

*Current charge is calculated as follows:*
*Billable units divided by Dwellings multiplied by Billable Rate less any Stormwater Credit.*
Service Period: 1/1/2025 to 3/31/2025

Autopay
2/21/25
BS

PAY YOUR BILL ONLINE AT: PORTLANDMAINE.GOV/STORMWATERBILLING

PAY YOUR BILL ONLINE AT: PORTLANDMAINE.GOV/STORMWATERBILLING