



## **Needs Analysis for 123 Sample Drive**

**Client:** John Adam

**Date Hired:** June 15, 2024

### **Overview:**

On March 10, 2024, John Adam purchased 123 Sample Drive from a wholesaler who completed the transaction via assignment. Despite the beautifully renovated property, key issues need to be addressed before the property can be sold. These include a glaring structural concern and regulatory compliance issues that must be resolved to avoid complications during a title search or sale.

### **Identified Issues:**

#### **1. Structural Concern:**

- A chimney appears to be pulling away from the house. This issue requires evaluation by a licensed engineer to assess potential structural concerns and prepare for potential buyer questions.

#### **2. Regulatory and Permit Concerns:**

- The property has a code violation from Baltimore City and is listed on the Vacant Home List.
- The violation requires obtaining a new Use and Occupancy (U&O) certificate.
- A batch of permits (electrical, plumbing, HVAC, and general) was pulled by a "permit expert" before the property was sold to John. However, inspections were never conducted.
- The contractor/permit expert who originally opened the permits is uncooperative, and John does not have the necessary licensing to address these permits.

### **Additional Permit Details:**

On December 14, 2023, the following permits were pulled by the permit expert:

- **Interior/Exterior Alterations:**  
SCOPE OF WORK: INTERIOR/EXTERIOR ALTERATIONS TO INCLUDE: INTERIOR (CATEGORY I) DEMOLITION: INSTALLATION OF 1 EXTERIOR DOOR (SAME SIZE SAME LOCATION) / EXTERIOR WALL FRAMING (PERIMETER WALLS ONLY/NO NEW PARTITION WALLS TO BE BUILT) / 600 SQ FT DRYWALL / REPLACE 400 SQ FT OF ROOF SHINGLES (NON-STRUCTURAL ALTERATIONS TO BE DONE TO THE ROOF) / REPAIR FRONT & REAR DECKS (40 SQ FT, REPAIRS ONLY, NO STRUCTURAL ALTERATIONS TO BE DONE TO THE DECKS), ALL WORK WILL BE DONE ACCORDING TO BALTIMORE CITY CODE.
- **Electrical, Plumbing, and HVAC Work:**  
INSTALL (1) 200 AMPS ELECTRIC SERVICE UP TO 600V (#AMPS), (15) # BRANCH CIRCUITS/FEEDERS, (1) 24000 BTU AIR-CON SYSTEM, HEAT PUMP, (1) # NEW DISTRIBUTION SYSTEM (1-2 FAMILY), (1) 72000 BTU FUEL-BURNING EQUIP (FURNACE), (8) # PLUMBING FIXTURES, (1) # WATER SERVICE PIPE (RECONSTRUCTION), (1) # SANITARY CONNECTION (RECONSTRUCTION), (1) # GAS TEST, (1) 18000 BTU FUEL-BURNING EQUIP, (1) 72000 BTU FUEL-BURNING EQUIP AS PER CODE.

### **Assessment of the Situation:**

- The wholesaler paid \$5,000 to a "permit expert" for a complete set of services, including managing inspections. However, the permit doctor has failed to follow through, a pattern noted in the "permit experts" online reviews.
- To obtain the required U&O certificate, all permits must be inspected, followed by a final inspection. The involvement of the original contractor is mandatory, but since they are unavailable, an alternative solution is needed.
- Without addressing these issues, any buyer's title company will flag the violation letter and the need for a use and occupancy certificate. The buyer agent, lender, title company, or buyer could easily find open and un-inspected permits, halting the sale process until inspections and a Use and Occupancy certificate is issued.

### **Recommended Actions:**

1. **Permit Resolution:**
  - Engage one of Refresh Homes' legitimate permit experts, experienced in permit assistance, to meet with the head inspector for the area. This will clarify the specific permits and inspections Baltimore City requires to obtain the U&O certificate.
  - Estimated cost for permit services: **\$2,500 - \$7,500**, depending on the city's requirements and the trade licenses involved.
2. **Chimney Assessment:**

- Arrange for a licensed engineer to assess the chimney and provide a professional report. This will preemptively address any concerns from a buyer and mitigate negotiation setbacks.
- Estimated cost for the engineer's letter: **\$400 - \$500**.

**Limitations:**

This needs analysis is based on a surface-level assessment, not a complete home inspection. Refresh Homes holds no liability for additional issues that may be discovered during a formal home inspection or later evaluations.

**Conclusion:**

Addressing the identified structural and regulatory issues will position 123 Sample Drive for a successful sale and prevent legal or transactional roadblocks. Refresh Homes will coordinate with contractors and engineers to ensure compliance with Baltimore City requirements and facilitate progress toward a market-ready property.

**Liability Disclaimer:**

This needs analysis is intended solely to provide guidance based on the information and observations available during the assessment. Refresh Homes and Ron Howard are not responsible for unforeseen issues or defects that may arise during subsequent inspections, evaluations, or the sales process. The recommendations provided herein are advisory and do not guarantee outcomes.

Furthermore, Refresh Homes and Ron Howard assume no liability for any actions taken or not taken by the client or third parties based on this needs analysis. All costs, timelines, and recommendations are estimates and subject to change depending on Baltimore City's requirements, contractor availability, and other variables beyond our control.

Sincerely,



Refresh Homes, llc. MHIC #147779

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