

CASAFORTA · PRIVATE REAL-ESTATE OPERATIONS
OFFICE

OWNER CLARITY DIAGNOSTIC™ SAMPLE REPORT

ILLUSTRATIVE SAMPLE — FICTIONAL COMPOSITE BUILDING. NO REAL CLIENT
PROPERTY OR CLIENT RESULT IS REPRESENTED.

Scenario building: brick walk-up, 1962 · six residential units · flat roof · an
unspecified Montréal borough.

Operating scenario: self-managed, partial records, no recent condition review.

Version 1.1 · Published July 2026 · Illustrative document — every mandate differs: your
Diagnostic will reflect your building.

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EXECUTIVE SUMMARY

ILLUSTRATIVE SAMPLE — FICTIONAL COMPOSITE BUILDING. NO REAL CLIENT PROPERTY OR CLIENT RESULT IS REPRESENTED.

This report shows, page by page, what an owner receives from the Owner Clarity Diagnostic™. The building described is a fictional composite assembled to demonstrate the method.

In this scenario the building is **broadly sound but under-documented**: the roof was redone and the invoice exists, but the maintenance history is incomplete and records are fragmented. Three observations call for near-term action — a wobbly balcony guardrail (priority), open masonry joints on the north elevation, and a period electrical panel to be assessed by a master electrician. Two components show advanced wear and appear in the capital outlook.

Every finding or action row carries **one label**: known fact, observation, pending, recommendation or owner decision required. Missing information stays displayed as missing — it never silently becomes "no issue".

The Diagnostic's five labels

Label	Meaning
KNOWN FACT	Documented; the source is named.
OBSERVATION	Seen on site, dated; distinct from a conclusion.
PENDING	Information requested, not yet received.
RECOMMENDATION	Action proposed by CASAFORTA, with priority and horizon.
OWNER DECISION REQUIRED	A choice explicitly reserved to the owner — never made in their place.

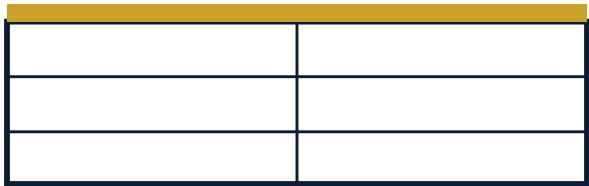
1. BUILDING HEALTH SCORE™

An expert reading of condition, by category, based on available observation and documentation — **not an engineering opinion.**

B- · illustrative overall grade of the composite scenario

Category grades (illustrative scenario)

Category	Grade	Reading
Envelope (masonry, windows)	C+	Open joints on the north elevation; two windows showing observable advanced deterioration.
Roof	B+	Redone in 2016, invoice on file; normal monitoring.
Visible structure	B	No observable sign of distress; visual reading only.
Mechanical (plumbing, heating)	C	Water-heater ages undocumented — information pending.
Electrical	C	Period panel; assessment by a master electrician recommended.
Safety (balconies, exits)	C-	Rear guardrail wobbly — priority.
Records	D+	Incomplete maintenance history and fragmented records.



Schematic elevation — 3 storeys × 2 units

Illustrative image — schematic created for this sample; no real property.

2. PRIORITIZED ACTION PLAN

Each finding is broken into labelled rows: what is seen, what is known, what is missing, what CASAFORTA proposes — and what is yours to decide.

PRIORITY 1 — REAR BALCONY GUARDRAIL

OBSERVATION	Second-level rear balcony guardrail wobbly under manual test (illustrative visit, June).
RECOMMENDATION	Have it secured without delay by a contractor holding the applicable RBQ licence; horizon: immediate.
OWNER DECISION REQUIRED	Approve, defer or decline the proposed next step.

PRIORITY 2 — MASONRY, NORTH ELEVATION

OBSERVATION	Open masonry joints observed at the north elevation — an illustrative observation recorded for this scenario.
RECOMMENDATION	Obtain a masonry assessment and repair scope within 12 to 24 months.
OWNER DECISION REQUIRED	Approve, defer or decline the proposed next step.

PRIORITY 3 — PERIOD ELECTRICAL PANEL

OBSERVATION	Electrical panel of an older equipment generation.
RECOMMENDATION	Have it assessed by a master electrician — regulated acts belong to authorized professionals.
OWNER DECISION REQUIRED	Commission the proposed assessment, or not.

RECORDS AND FOLLOW-UP

KNOWN FACT	Incomplete maintenance history and fragmented records (scenario finding).
RECOMMENDATION	Build the Building Passport™: leases, invoices, warranties, photos, decisions — one memory.
PENDING	Water-heater age and condition: requested, not received at report date.
PENDING	Certificate of location: requested.
KNOWN FACT	Insurance certificate current (copy in the scenario file).
OBSERVATION	Rear drainage slope directing water toward the foundation — seasonal watch.

Every "pending" item stays on the record until it is received or resolved — it is followed up, dated and tracked. Each owner decision (approve, defer or decline) is recorded with its date: the report remains the faithful memory of what was seen, known, requested and decided.

3. 25-YEAR CAPITAL SNAPSHOT™

What the building will ask for, and when — in **illustrative planning ranges**. These are not quotations, appraisals or construction estimates.

Capital horizon (illustrative planning ranges)

Component	Horizon	Illustrative range	Label
Repointing, north elevation	1–2 years	low-to-mid range	RECOMMENDATION
Two windows showing observable advanced deterioration	2–4 years	low range	OBSERVATION
Water heaters (age unknown)	to confirm	to be set once the information is received	PENDING
Roof (redone 2016)	10–15 years	mid range — normal monitoring	KNOWN FACT
Balconies and guardrails	immediate + 10-year cycle	one-time securing, then cycle	RECOMMENDATION

In a real Diagnostic, each range is set for your building and linked to the 25-Year Capital Plan™ if you order it.

4. OPERATIONS, RECORDS AND KNOWN-OBLIGATIONS REVIEW

This section **flags** missing documents and matters requiring verification; it **never certifies** legal or regulatory compliance.

Item	State in the scenario	Label
Leases	Leases in force; one renewal upcoming (scenario aggregate).	KNOWN FACT
Building insurance	Certificate current, copy on file.	KNOWN FACT
Certificate of location	Requested, not received.	PENDING
Maintenance history	Incomplete; records fragmented across emails and paper.	KNOWN FACT
Known obligations of the scenario	No regulatory deadline was confirmed from the records reviewed; verification remains required.	PENDING

5. RECOMMENDATIONS AND NEXT STEPS

- **RECOMMENDATION** Secure the rear guardrail — immediate, contractor holding the applicable RBQ licence.
- **RECOMMENDATION** Masonry assessment and repair scope — 12 to 24 months.
- **RECOMMENDATION** Electrical-panel assessment by a master electrician.
- **RECOMMENDATION** Build the Building Passport™ and complete the pending information.
- **OWNER DECISION REQUIRED** For each recommendation: approve, defer or decline — the report is yours, and so is what happens next.

What next? If you wish, the mandate proposal defines — in writing — scope, authorization thresholds and limits. Or you simply keep the report: it is yours.

APPENDIX — METHOD AND LIMITS

The Diagnostic rests on a documented visit (time-stamped photos in a real mandate), a reading of the documents provided, and building-inspection experience. Items not accessible or not provided stay labelled "pending" — never converted into "no issue".

DISCLAIMER

The Owner Clarity Diagnostic™ is an expert reading based on observation and documentation. It is **not an engineering, legal, appraisal or insurance opinion**. Regulated work and official documents are performed and signed by authorized professionals and contractors holding the applicable licences. This document is an illustrative sample: every mandate differs, and your Diagnostic will reflect your building.