



49 Old Farm School Rd.

Asheville, NC 28805

828-298-3520

www.landarbor.com

July 11, 2011

Mr. David Kidder
Pisgah Valley Retirement Community
95 Holcombe Cove Rd.
Candler, NC 28715

Dear Mr. Kidder,

Enclosed is my report of the evaluation of the current health and structural condition of four trees, which are soon to be affected by upcoming construction at the Pisgah Manor nursing and rehabilitation facility. It is based strictly on my visual inspection, per your request. The report also discusses the effect construction activities might have on the future health of these trees.

Very briefly, I find your trees to be in good health and condition and to be structurally sound; they are an asset to your facility. Two of the trees are located within the walls of the future building addition. These trees will need to be removed prior to construction. The other two trees will be indirectly affected by construction activities. These trees can be reasonably well protected during the construction process, and should survive in good shape. They will, however, be completely surrounded when the new addition closes off the existing three-sided building; this will severely restrict access for future care and maintenance. Keeping the trees will preserve the established, mature feel of the landscape that the residents, visitors, and employees like so much, but severely limit other uses of the space. Future maintenance of the trees will be an issue, especially as the trees get older. Removing the trees will allow their vacated space to be transformed into a new outdoor living area, with the potential for greater use than the space has now. It will, however, take years to recapture the established feel created by the mature trees. All things considered, my recommendation is to remove the trees and develop the space into a new outdoor living area.

If you have any questions, please call me at 828-298-3520. It was a pleasure working with you on this assignment.

Sincerely,

Andy White, Registered Consulting Arborist #510
LandArbor Consulting, Inc.
49 Old Farm School Rd.
Asheville, NC 28805
828- 298-3520
www.landarbor.com

Pre-Construction Tree Evaluation for Pisgah Manor

Prepared For:

Mr. David Kidder
Pisgah Valley Retirement Community
95 Holcombe Cove Rd.
Candler, NC 28715

Submitted by:

Andy White, Registered Consulting Arborist #510

July 11, 2011



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Summary

Mr. David Kidder asked me to do a visual inspection of four trees at Pisgah Manor, a skilled rehabilitation and nursing facility, in June of 2011. The purpose of the inspection was to evaluate the health and structural condition of the trees, and to determine what, if any, immediate and long-term effects upcoming construction would have on them. He asked me to provide him with a formal tree evaluation report based on my visual observations.

I found the trees to be in good health and structurally sound; they are an asset to the facility, providing much needed shade and a comfortable, established atmosphere. Two of the trees are located within the walls of the future building addition. These trees will need to be removed prior to construction. The other two trees will be indirectly affected by construction activities. They can be reasonably well protected during the construction process, and should survive in good shape. They will, however, be completely surrounded when the new addition closes off the existing three-sided building; this will severely restrict access for future care and maintenance. Keeping the trees will preserve the established, mature feel of the landscape that the residents, visitors, and employees like so much, but severely limit other uses of the space. Future maintenance of the trees will be problematic, especially as the trees get older. Removing the trees prior to or during construction will be easier and less costly than post construction. Removing the trees will allow their vacated space to be transformed into a new outdoor living area, which has the potential for greater use than it does now. It will, however, take years to recapture the established feel created by the mature trees. All things considered, my recommendation is to remove the trees and develop the space into a new outdoor living area.

Introduction

Background and History

Mr. David Kidder is President / CEO of Carolina Adventist Retirement Systems, Inc. in Candler, North Carolina. One of the facilities under his direction is Pisgah Manor, which is a skilled rehabilitation and nursing facility that is part of the Pisgah Valley Retirement Community. Pisgah Manor was built in 1975, and is now in need of updating and renovation. The architectural firm of Bowers, Ellis, and Watson, PA, was hired in April of 2010 to develop plans for the upgrades. Mr. Kidder continually stressed the importance of the existing trees to the architects, and their preservation was always given high priority during the design phase. Nevertheless, it was not possible to avoid negative impact to all trees in the immediate vicinity, and still do the necessary new construction and remodeling.

I have been a consultant and contractor for Mr. Kidder and the Pisgah Valley Retirement Community for the past twenty years. I have been a member of his advisory team on this particular project since its conception in 2010. The recently completed plans for the construction and remodeling do a good job of providing the much needed additional space and upgrades to the facility while minimizing damage to the existing landscape and trees. When Mr. Kidder reviewed the final draft of the plans, it was immediately obvious to him that there were a number of important trees that needed to be evaluated within the context of the anticipated construction work and the future of the facility. Specifically, there were four trees within the project footprint that Mr. Kidder wanted me to evaluate so that he could have the information necessary to decide the future direction of the landscape and gardens in this area. The trees in question were ones with which I was already familiar and had a working history. In fact, I supervised the pruning and repositioning / replacing of existing Cobra® cables in three of the trees several months prior to Mr. Kidder's call for this evaluation. Mr. Kidder realizes the importance of these trees to the residents of Pisgah Manor, and is dedicated to making the right decision regarding their future.

Mr. Kidder called me on June 14, 2011, and asked if I would meet him at Pisgah Manor to review the final draft of the architectural plans he had just received to determine what, if any, impact the new construction would have on the four trees he was concerned about.

Assignment

At the conclusion of our telephone conversation on June 14, 2011, Mr. Kidder and I agreed to the following assignment for me:

1. To meet him at the site (Pisgah Manor) in the near future and review the plans for the anticipated new construction and remodeling work as it relates to its effect on four existing trees located within the construction zone.
2. To visually inspect the four trees to assess their current health and structural condition.
3. To write a formal tree evaluation report of the visual findings, including a discussion of the effect construction activities might have on the future health of the trees, and to make a recommendation regarding the future of the trees and the space they occupy.

Limits of the Assignment

Mr. Kidder requested the evaluation be conducted as soon as possible. He needed immediate information to make decisions that would be important to general contractors who would soon be bidding on the project. My evaluation was restricted to a visual observation of the trees.

Purpose and Use of the Report

The purpose of this report is to provide Mr. David Kidder with information regarding the health and structural condition of four trees located within a future construction zone, and to provide him with information on the effects the construction will have on the future health and maintenance of the trees. This information will be used by Mr. Kidder to determine the fate of the trees; specifically, should the trees remain and be carefully guarded and cared for during construction, or should the trees be removed prior to construction and the area redeveloped. Mr. Kidder is charged with deciding which of these options is in the best long-term interests of Pisgah Manor and its residents. The information in this report will be used by him to help make the right decision.

Observations

I met Mr. Kidder at the Administration Building for the Pisgah Valley Retirement Community on July 1, 2011. It is located at 95 Holcombe Cove Rd., Candler, NC 28715. On my way to the Administration Building, I drove by the Pisgah Manor facility and made note of the four trees in question. They stand out prominently (see Appendix B, Photo 1). They are some of the largest trees in the area, and the only shade trees in front of the building, which is southeast facing.

We had a brief discussion of my assignment and then we reviewed the latest plan documents in his office. Mr. Kidder informed me that several changes / additions had been made to the plans since our earlier telephone conversation, and that more changes are possible. He said that he would make arrangements with the architectural firm to have the latest versions of pertinent plan pages emailed to me for my use in this evaluation and report.

While reviewing the plans in Mr. Kidder's office, it became apparent that two of the four trees in question (designated as Trees #1 and #2 in this report) are located well within the confines of the new building addition (see Appendix A – Site Plan #2, red dots). These two trees, noted as "Maples" on the architect's "Existing Conditions" plan (see Appendix A – Site Plan #1, red arrows), cannot be preserved if the current building plans are implemented. We decided that I would verify the location of these two trees with respect to the proposed construction, and if the plans were accurate I would not further evaluate these two trees.

The other two trees in question, also noted as "Maples" on the architect's "Existing Conditions" plan (see Appendix A – Site Plan #1, green arrows), are located in areas that appear to be outside of the zone of direct construction activities (see Appendix A – Site Plan #2, green dots). On paper, these two trees (designated as Trees #3 and #4 in this report) appear to be salvageable if given proper protection during construction. The issue with these two trees is that completion of the new building addition will severely limit future access to them; they will be situated in a large, enclosed courtyard with severely restricted access for future care and maintenance. At this time, Mr. Kidder mentioned that these trees have many surface roots, which are proving to be

problematic for his grounds maintenance crew, and hazardous to his ambulatory residents / patients and their visitors. He also said that the architects are concerned that the tree roots might eventually damage the building foundation and adversely affect drainage systems in the area, if they have not already done so.

After reviewing the plans in Mr. Kidder's office, I walked a short distance to where the trees are located and conducted my site evaluation. I first examined the two trees that are shown on the plans to be located within the walls of the future building addition (see Appendix B – Photo 2, Trees #1 and #2). I verified that these trees are located as marked on the plans (see Appendix A, Site Plan #2, red dots), and made note of their need for removal. I positively identified the trees in question as a 15 inches in **diameter at standard height (DSH)** Norway maple, *Acer platanoides* 'Crimson King' (designated Tree #1) and a 39 inch silver maple, *Acer saccharinum* (designated Tree #2). **Note: bold terms are defined in the Glossary, page 9.** Measurements were taken with a **diameter tape**. Identification of the trees was made using resource manuals (Dirr, 1990, Graves, 1956) brought with me to the site. Since these trees were scheduled for removal, no more time was spent measuring and evaluating them.

Next, I visually inspected the other two trees in question. These trees are both identified as silver maples; one measures 37 inches in diameter at standard height (designated Tree #3) and the other measures 39 inches in diameter (designated Tree #4). They are located as marked on the architect's "Existing Conditions" plan (see Appendix A, Site Plan #1, green arrows). Both of these trees appear to be healthy, mature specimens. Their age is estimated at about 40 years old; this is based on the age of the building (36 years old) and David Kidder's recollection that the trees were small, maybe 6 inches in **diameter at 12 inches**, when he first started working at Pisgah Manor in 1986. Both trees have a **crown** spread of approximately 60 feet and height of 70 feet – estimated by using relative comparisons of nearby structures and objects of known size (see Appendix B – Photo 3, Trees #3 and #4) Both trees had been pruned several months earlier and their **Cobra® cabling systems**, which were installed 5 years previously, were replaced / repositioned at that time (see Appendix B – Photo 4). The trees have good **root flare** and **trunk taper** (see Appendix B – Photo 5). There are no obvious signs of disease, decay, or insect infestation. Their limbs are normal in size and distribution. **Crotch angles** are typical for the species; no dangerously acute angles are observed (see Appendix B – Photo 6). The foliage appears normal in color and volume. The **apical growth** has ranged from 10 to 12 inches over the last 5 years. There is considerable mounding at the base of the trees caused by expanding tree roots pushing the soil up above them (see Appendix B – Photos 5 and 7). Both trees have numerous surface roots, both under the **canopy** and extending beyond (see Appendix B – Photos 7 and 8). Many of the larger, more prominent roots have numerous wounds caused by repeated encounters with lawn mower blades over many years. Surface roots are observed close to the building foundation (see Appendix B – Photo 9). The **drip line** environment of these trees consists of lawn area, concrete walkway, and river stone mulch along the building foundation.

While conducting my evaluation, several people saw me working and commented on the trees. They unanimously expressed their fondness for the trees and the pleasure they get from them. These comments were made by residents, visitors, and employees.

Testing and Analysis

As part of my visual inspection, I took digital photographs of the trees and surrounding area to document their condition at the time of my site visit. Pertinent photos are included in this report (Appendix B) as supporting materials; all were taken 7-1-2011, unless otherwise indicated.

Discussion

As one approaches Pisgah Manor by vehicle, the four trees in question stand out prominently. They are some of the largest trees in the area, and the only shade trees in front of the building, which is southeast facing. They give a “well-established” feeling to the building. The trees are held in high regard by residents, visitors, and employees.

Since two of the four trees in question (a Norway and a silver maple) are obviously well within the walls of the proposed new building addition, they were not further evaluated, and will not be discussed further because they are to be removed if construction proceeds as planned.

This leaves only the other two silver maples to discuss. According to the literature (Dirr, 1990), silver maples (*A. saccharinum*) reach “50 to 70’ in height and can grow to 100 to 120’; spread is usually about 2/3’s the height...fastest growing American maple species...with fast growth comes a weak-wooded tree, often will break up in wind, ice, and snow storms...The use of this tree should be tempered as it becomes a liability with age; possibility for rugged conditions or where someone desires fast shade...responds well to heavy fertilization and watering...will cause sidewalks to buckle and drain tiles to clog because of vigorous, gross feeding root systems...” Our two subject trees, at approximately 40 years old and 70 feet tall, are relatively mature plants.

Five years ago we recognized the potential danger these trees posed to the building, surrounding environment, pedestrians, and the trees themselves in the event of major limb / trunk failure. At that time we proactively installed Cobra® cabling systems to provide some protection. The cabling systems have a two-fold purpose: first, to provide support to major branches / trunks to help prevent breakage in storm situations; second, to minimize damage if breakage does occur. In the spring of 2011, we repositioned / replaced the Cobra® cabling systems. This was done for two reasons: one, the trees had grown enough during the past five years that the cables needed to be repositioned to provide maximum support; two, the manufacturer recommends replacing the cables at 5 year intervals because of deterioration of the materials due to repeated physical stress and constant environmental exposure to sun, heat, cold, wet, wind, etc. Minor **deadwood** and

corrective pruning were done at the time the new cables were installed; very little pruning was necessary at this time as the trees were thoroughly pruned 5 years ago when the cables were first installed. The cabling and pruning were done before there was a clear indication that these trees would be within the future construction zone.

The numerous surface roots from these trees make mowing the lawn under them very difficult. Walking can be hazardous due to the multiple trip points caused by the roots, especially for older and rehabilitating patients. The mounding at the base of the trees is beginning to impede the positive surface drainage away from the building. Subsurface drain pipes were not inspected during this evaluation, but it is very possible that they are being affected by tree roots, or will be affected in the future. No evidence was found that tree roots were cracking or heaving the building foundations, which was a concern of the architects. However, given the nature of silver maples, it is entirely possible that these trees have caused, or will cause, some structural damage to the building. Exploratory digging would be needed to properly evaluate actual or potential structural damage; this evaluation is based solely on visual observation. As the trees grow and the roots continue to expand in diameter, all of the problems listed above will get worse.

The trees appear to be in good condition. Significant growth has occurred in the last five years as indicated by the need to reposition the cables higher up on the trunks and branches. The lawn areas under the trees are regularly fertilized and the trees are deriving some benefit from this. With proper protection of the root systems, these trees should not suffer significantly from the proposed construction activities.

There are ways to protect the building foundation and drainage system without causing permanent or potentially fatal damage to the trees. Mostly, this would involve cutting existing roots (if there are any) at a specified distance away from these structures and installing **grow-barriers** at these locations. Most of these structures occur near, or beyond, small segments of the drip line environment, so root damage from cutting would be minimal and something from which the trees should readily recover.

Essentially, a grow-barrier is something that will not allow roots to pass beyond it. These barriers can be physical or chemical, or a combination of both. The chemicals are usually specialized herbicides or growth retardants. A very effective physical barrier is a geotextile silt-barrier fabric (e.g., Mirafi 180N. For more information about this product go to www.tencate.com). The key with any barrier is proper placement; it must be placed so the roots cannot get above or below it. If installed properly and inspected regularly, these barriers should give permanent protection to the building foundation and drainage system.

Structurally the trees appear sound. They have good root flare and trunk taper. Their limbs are normal in size and distribution, and no dangerous, acute crotch angles were observed. With the newly reinstalled Cobra® cabling system the trees do not appear to be hazardous at this time. However, the species in general has a reputation for breaking apart during storms, especially as they get older.

Conclusions

Assuming the new construction goes according to plan, only two of the four trees evaluated in this project are of concern to Mr. Kidder moving forward.

Trees #1 and #2 will be removed since they lay inside the perimeter of the proposed new building addition.

Trees #3 and #4 can be protected during construction, but they will end up in an enclosed courtyard with severely restricted access for care and maintenance. These trees currently dominate the area and limit its use to mostly passive viewing and appreciation from the periphery. The trees' root systems are presenting maintenance problems and walking hazards, and are adversely affecting drainage in the area. These problems will get worse as the trees continue to grow. The trees will likely become hazardous during their **senescent** growth phase, as is characteristic of the species. Post construction removal of the trees will be difficult and costly. However, despite all of these problems and shortcomings, these trees currently provide much appreciated shade and comfort to the residents, visitors, and employees of Pisgah Manor and they should continue to do so for many years. These benefits will be difficult if not impossible to replicate in the near future if these trees are removed. Their removal will be noticed immediately, and met with sadness. As time goes on, the trees will become more and more of a liability, and this will overshadow any of their current benefits.

Without the trees, the space could be transformed into an outdoor living area with courtyards, patios, walkways, and gardens similar to the one built on campus behind the Administration Building several years ago (see Appendix B – Photo 10). None of these landscape elements are possible now, as construction activities to build them would be detrimental, if not fatal, to the trees. A new outdoor living area will receive more use than the existing area. It will be safer, and accessible to more people. The design of the new area can dictate future maintenance efforts, because there is control and choice involved in the design process. If the trees remain, however, they dictate future maintenance efforts, removing much of the control over future costs and efforts.

All things considered, I think removing the trees and redeveloping the area will be in the best long-term interests of the facility.

Recommendations

Based on my investigation and conclusions, I am recommending the following course of action regarding the four trees evaluated at Pisgah Manor.

1. Remove Trees #1 and #2. They lay within the perimeter of the proposed new building addition.
2. Remove Trees #3 and #4. This is in keeping with the reason for the new building addition and renovation work, which is to prepare for the future. These trees served their purpose well for the past 35 + years, but they will become a hindrance as they get older. They already limit the use of the space, and this will never improve as long as they exist. Their removal will allow for more and better use of the space. If properly designed and built, a new outdoor living area in this space will be a big asset to the facility, one that will be thoroughly enjoyed by current and future residents, visitors, and employees. The trees will be sorely missed, especially at first, but over time the benefits of the new outdoor living area will take over.
3. Remove all four trees and their stumps and roots before construction begins. This will reduce costs, unburden the work site, and allow for work to begin on the new outdoor living area while the other construction is in progress.

Glossary

apical growth – growth at the tip of a branch or root; growth from the apical **meristem**.

canopy – the overhead portion of a tree comprised of trunks and branches.

Cobra® cabling system – proprietary cabling / tree bracing system for trees; more information can be found at www.cobranet.de

corrective pruning – pruning done to improve the structural integrity or health of a plant.

crotch angle – the angle formed between a main branch and a side branch.

crown – the upper part of a tree, including the leaves and living branches.

deadwood – dead branches that are still attached to the tree.

diameter at standard height (DSH) – diameter of a tree trunk 4.5' off the ground.

diameter at 12 inches – trunk caliper measurements for young trees are measured 6 inches above ground level if the diameter is 4 inches or less; they are measured 12 inches above ground level if the diameter is more than 4 inches (ANSI 260.1-1996).

diameter tape – measuring device used to determine diameter of objects, such as trees.

drip line – imaginary line at the edge of the tree canopy.

grow barrier – a barrier that prevents growth; can be chemical or physical.

meristem – the growing area of rapidly dividing cells at the tip or side of a stem, root, or branch.

root flare – the flared area at the base of tree where the trunk and roots come together.

senescent – growing old; aging.

trunk taper – natural reduction in branch size from oldest wood to youngest wood.

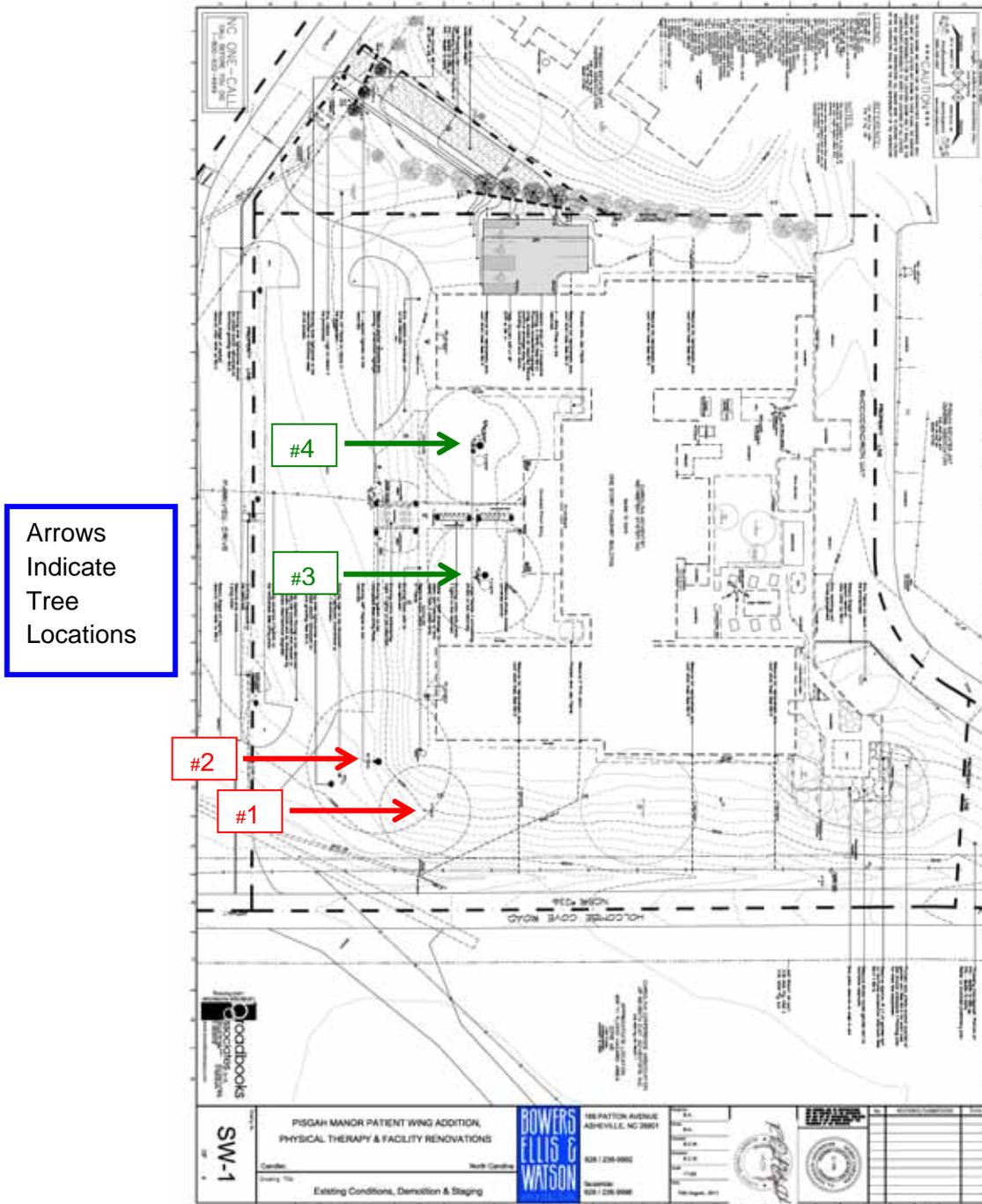
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ANSI 260.1-1996. American Standard for Nursery Stock. 1997. American Association of Nurserymen. Washington, DC.

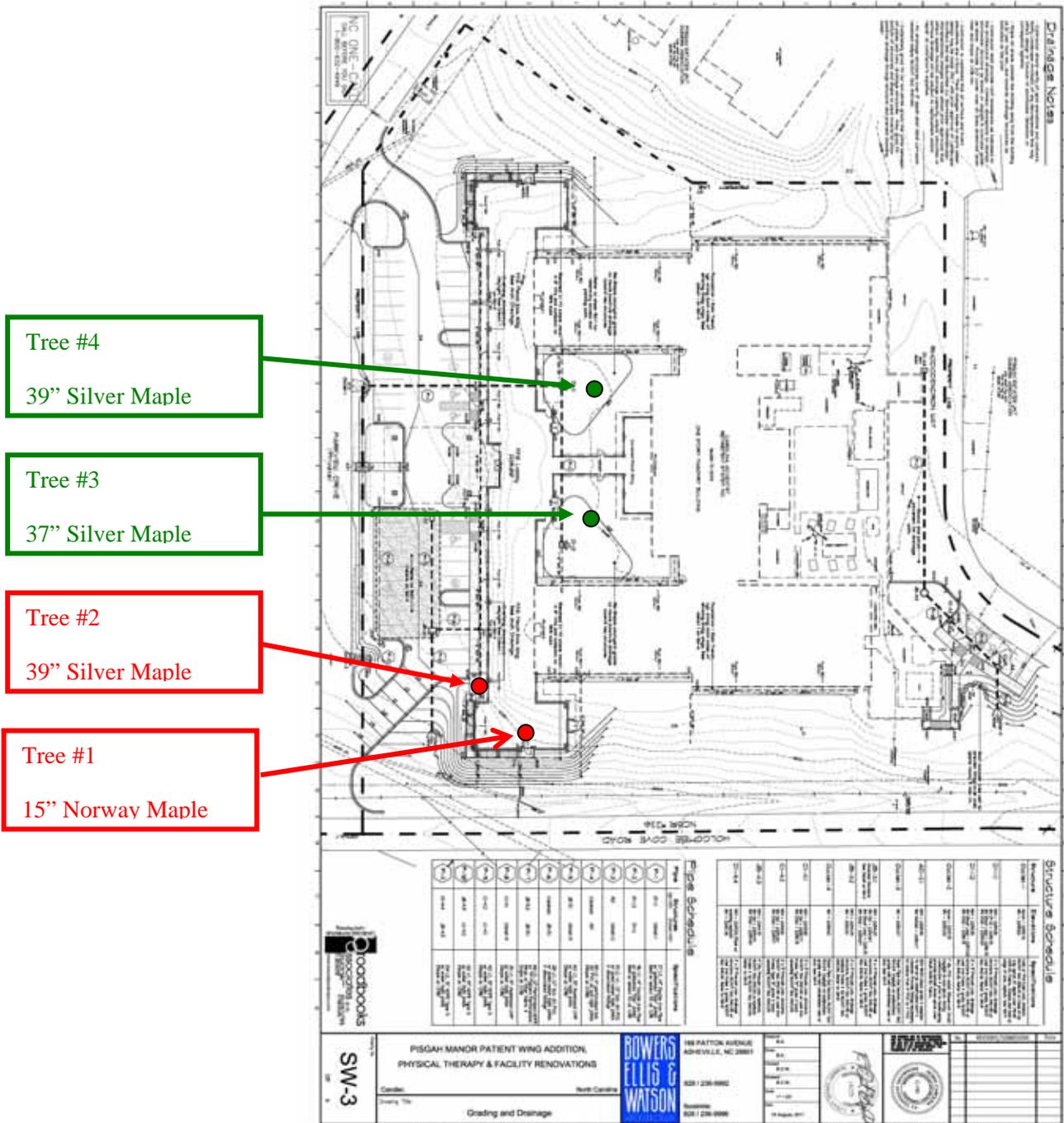
Dirr, Michael A. 1990. Manual of Woody Landscape Plants: Their Identification, Ornamental Characteristics, Culture, Propagation and Uses. (4th Edition). Stipes Publishing Company, Champaign, IL. 1007 pp.

Graves, Arthur H. 1956. Illustrated Guide to Trees and Shrubs. Harper & Row, New York, NY. 271 pp.

Appendix A – Site Plan #1, Existing Conditions



Appendix A – Site Plan #2, Location of Trees Relative to Proposed New Construction



Appendix B – Photos (all taken 7-1-2011 unless otherwise indicated)

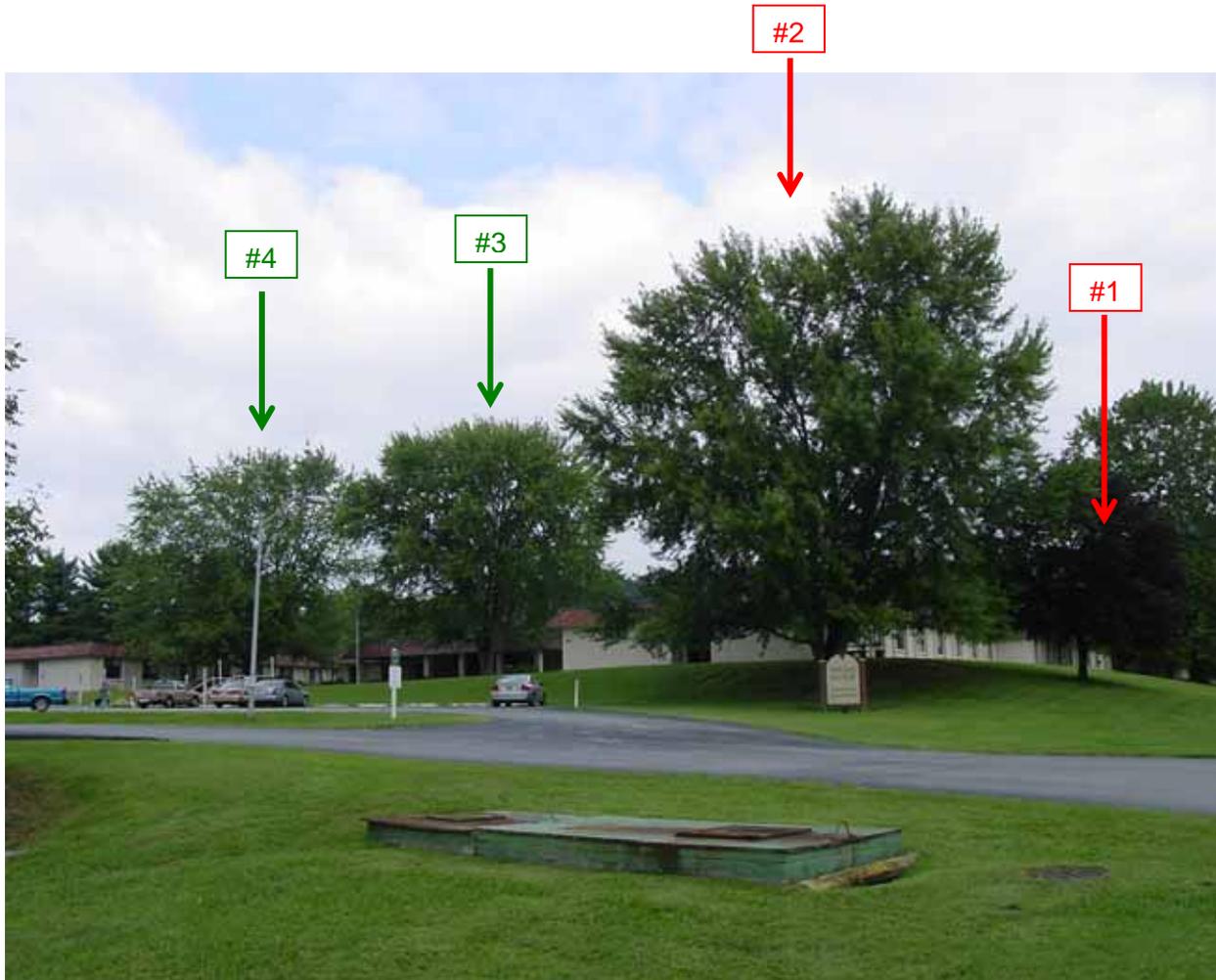


Photo 1 – Pisgah Manor, 95 Holcombe Cove Rd., Candler, NC 28715. The four trees evaluated in this report are marked with colored arrows. **Red color signifies definite need for removal; green signifies outside of construction zone.**

Tree Identification Key

Tree #1 - 15" Norway Maple, *Acer platanoides* 'Crimson King'

Tree #2 – 39" Silver Maple, *Acer saccharinum*

Tree #3 – 37" Silver Maple, *Acer saccharinum*

Tree #4 - 39" Silver Maple, *Acer saccharinum*

Appendix B – Photos (continued)

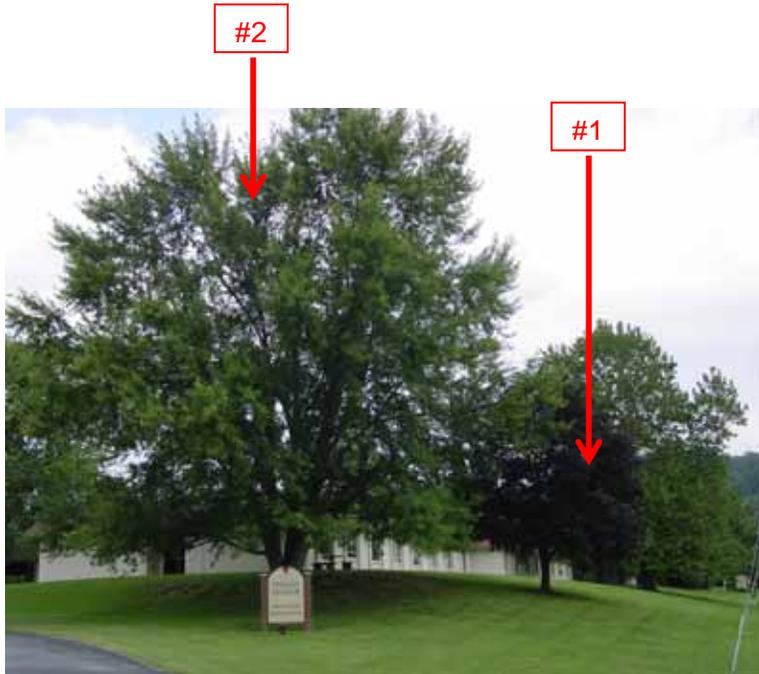


Photo 2 – Trees #1 and #2 at Pisgah Manor. These trees are within the proposed new building addition, and will need to be removed.

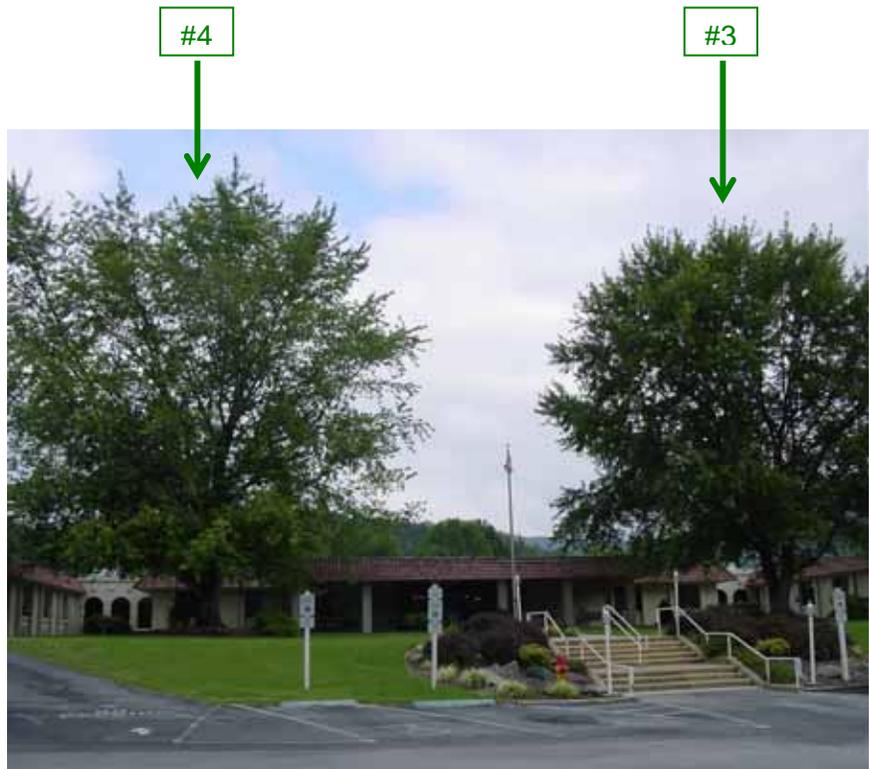


Photo 3 – Trees #3 and #4 in front of Pisgah Manor.

Appendix B – Photos (continued)



Photo 4 – Cobra® cabling system installed in one of the silver maple trees.

Photo 5 – Tree #4. Good root flare and trunk taper. Note the soil mounding at the base of the tree.



Appendix B – Photos (continued)



Photo 6 – Tree #3. Good crotch angles.

Photo 7 – Tree #3. Example of surface roots in the lawn area. Note the numerous wounds caused by mower blades, and the soil mounding at the base of the tree.



Appendix B – Photos (continued)



Photo 8 – Tree #4.
Another example of surface roots in the lawn area. Again, note the numerous wounds caused by mower blades.

Photo 9 – Roots of Tree #4 close to building foundation.



Appendix B – Photos (continued)



Photo 10 – Photo taken by David Kidder of new outdoor living area behind the Administration Building at Pisgah Valley Retirement Community. Photo taken 6-08-10. Project was completed in spring of 2009.

Appendix C – Assumptions and Limiting Conditions

1. Any legal description provided to the consultant is assumed to be correct. Any titles and ownerships to any property are assumed to be good and marketable. No responsibility is assumed for matters legal in character. Any and all property is evaluated as though free and clear, under responsible ownership and competent management.
2. Care has been taken to obtain all information from reliable sources. All data has been verified insofar as possible; however, the consultant can neither guarantee nor be responsible for the accuracy of information provided by others.
3. The consultant shall not be required to give testimony or attend court by reason of this report unless subsequent contractual arrangements are made, including payment of an additional fee for such services as described in the fee schedule and contract of engagement.
4. Loss or alteration of any part of this report invalidates the entire report.
5. Possession of this report or a copy thereof does not imply right of publication or use for any purpose by any other than the person to whom it is addressed, without the prior expressed written or verbal consent of the consultant.
6. Neither all nor any part of the contents of this report, nor copy thereof, shall be conveyed by anyone, including the client, to the public through advertising, public relations, news, sales or other media, without the prior expressed written or verbal consent of the consultant particularly as to value conclusions, identity of the consultant, or any reference to any professional society or institute or to any initialed designation conferred upon the consultant as stated in his qualifications.
7. This report and values expressed herein represent the opinion of the consultant, and the consultant's fee is in no way contingent upon the reporting of a specified value, a stipulated result, the occurrence of a subsequent event, nor upon any finding to be reported.
8. Sketches, diagrams, graphs, and photographs in this report, being intended as visual aids, are not necessarily to scale and should not be construed as engineering or architectural reports or surveys.
9. Unless expressed otherwise: (1) information contained in this report covers only those items that were examined and reflects the condition of those items at the time of inspection; and (2) the inspection is limited to visual examination of accessible items without dissection, excavation, probing, or coring. There is no warranty or guarantee, expressed or implied, that problems or deficiencies of the plant or property in question may not arise in the future.

Appendix D – Certificate of Performance

I, Andy White, certify that:

- I have personally inspected the trees and the property referred to in this report and have stated my findings accurately. The extent of the evaluation is stated in the attached report and the Limits of the Assignment.
- I have no current or prospective interest in the trees or the property that are the subject of this report and have no personal interest or bias with respect to the parties involved.
- The analysis, opinions, and conclusions stated herein are my own and are based on current scientific procedures and facts.
- My analysis, opinions, and conclusions were developed and this report has been prepared according to commonly accepted arboricultural practices.
- No one provided significant professional assistance to me, except as indicated within the report.
- My compensation is not contingent upon the reporting of a predetermined conclusion that favors the cause of the client or any other party nor upon the results of the assessment, the attainment of stipulated results, or the occurrence of any subsequent events.

I further certify that I am a member in good standing of the American Society of Consulting Arborists, and the International Society of Arboriculture. I have been involved in the field of Arboriculture in a full-time capacity for a period of more than 30 years.

Signed: _____

Date: _____