

Property Information

Property owner	Geocode
Property address	Doing business as (DBA) or building name
Mailing address	

Annual Income and Operating Expenses

Annual Income	2018	2019
Actual rent collected (total rents received)	\$	\$
Vacancy and/or collection loss	\$	\$
Rental income subsidized by government	\$	\$
Other income	\$	\$
Ground rent received	\$	\$

It may be helpful to have your income tax forms available when completing the section below as some of the information may be the same.

Annual Operating Expenses	2018 Overall Expenses	Amount Reimbursed by Tenants	2019 Overall Expenses	Amount Reimbursed by Tenants
Advertising	\$	\$	\$	\$
Cleaning and maintenance	\$	\$	\$	\$
Commissions	\$	\$	\$	\$
Insurance	\$	\$	\$	\$
Legal and accounting fees	\$	\$	\$	\$
Management fees	\$	\$	\$	\$
Payroll and benefits	\$	\$	\$	\$
Mortgage interest	\$	\$	\$	\$
Repairs	\$	\$	\$	\$
Supplies	\$	\$	\$	\$
Property taxes	\$	\$	\$	\$
Utilities	\$	\$	\$	\$
Depreciation expense	\$	\$	\$	\$
Other expenses	\$	\$	\$	\$
Reserves for replacement	\$	\$	\$	\$
Capital expenses	\$	\$	\$	\$
Ground rent paid	\$	\$	\$	\$

Clarification for other expenses, irregularities, issues affecting certain items, etc.

Mini-Warehouse Rental Data

Mini-Warehouse Data—If additional room is needed, please attach a separate sheet.

Size (L x W)	Number of Units	2018 Monthly Rent	2019 Monthly Rent	Temp Control			Electricity		
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						
X		\$	\$						

	2018	2019
Total number of units		
Average occupancy	%	%

Property Data						
Number of outdoor parking spaces		Market rent		\$		
Parking space rent frequency		Daily		Weekly		Monthly
Amenities		Gated access		On-site manager		Surveillance
Concessions or Specials						

Mobile Home Park or RV Park Rental Data

Rental Data

Mobile Home Spaces	Number of mobile home spaces	2018 Monthly rent per space	2019 Monthly rent per space	Mark if rent includes utilities		
Singlewide (lot only)		\$	\$			
Doublewide (lot only)		\$	\$			
Singlewide (with mobile home)		\$	\$			
Doublewide (with mobile home)		\$	\$			
Additional fees (Please indicate fee and related service)						
Concessions or Specials						

RV Spaces	RV full service	RV limited service
Number of RV spaces		
Daily rent per space	\$	\$
Days of operation		

Tent Sites	
Number of sites	
Daily rent per unit	\$
Days of operation	

Boat Storage	
Number of boat spaces	
Daily rent per unit	\$
Days of operation	

Cabins	
Number of cabins	
Daily rent per unit	\$
Days of operation	

Parking Spaces	
Number of spaces	
Daily rent per unit	\$
Days of operation	

General Commercial Use Rental Data

(Use for office, retail, warehouse, and restaurants.)

Current Rent Roll Include all vacant spaces. Provide asking rent. If additional room is needed, attach a separate sheet.							Expense Responsibilities Enter T for Tenant, L for Landlord, or B for Both					
Tenant name	Level (bsmt, 1st, 2nd, etc.)	Square feet	Annual base rent	Additional rent received	Lease information			Utilities	Insurance	Taxes	Janitorial services	Maintenance/ repair
					Type	Start date	End date					
			\$	\$								
			\$	\$								
			\$	\$								
			\$	\$								
			\$	\$								
			\$	\$								
Total rent escalation in lease		% per		Years		Concessions or Specials						
Typical tenant improvement (TI) allowance for vacant space		\$		per								
Tenant Improvement Allowances If additional room is needed, attach a separate sheet.												
Tenant name	Amount paid by each		Additional rent paid to landlord for TI allowance	Dates for additional rent collected		Mark if TI Reimbursements include a finance charge.						
	Paid by landlord	Paid by tenant		Start	End							
	\$	\$	\$									
	\$	\$	\$									
	\$	\$	\$									
	\$	\$	\$									
	\$	\$	\$									
	\$	\$	\$									
Tenant improvements description or additional comments												

Survey completed by	Date
Title	Contact phone
Email address	

Mixed-Use Income and Expense Survey Terminology

Income Terms

Actual rent collected (total rents received)—Actual income collected from rental sources.

Vacancy and/or collection loss—Loss of income based on vacant units or inability to collect rental payments from tenants.

Operating Expense Terms

Advertising—Expenses for online and direct mail advertising, print ads, promotional items, sponsorships, and related costs to promote the property in the market.

Cleaning and maintenance—Expenses including janitorial services, including window and carpet cleaning; HVAC, plumbing, and electrical systems maintenance fees; ongoing upkeep of common area landscaping; costs for lighting and security systems; snow removal; contracted services; and real and personal property maintenance fees.

Commissions—Amount paid for leasing fees and commissions to market vacant building space.

Insurance—Fixed expense of the property's annual insurance premium for replacement in case of fire or other property loss.

Legal and accounting fees—Fees associated with bookkeeping, attorneys, and accountants for services related to the business.

Management fee—Agency fee paid by owner to a management company to oversee day-to-day operation of the property. This is typically based on a percentage of collected rent.

Payroll and benefits—Expenses including wages, salaries, benefits, payroll taxes and related worker's compensation expenses for the staff needed to operate the property.

General Terms

Days of operation—(For use in Mobile Home Park or RV Park section) The number of days open for business within the calendar year.

Other income—Income from other sources related to the rental property, including application and late fees, vending machines, parking, etc.

Ground rent received—Rent received for land that is separate from a building such as rent received for vacant land used for a car lot or rent received for leased land under a building.

Mortgage interest—Mortgage interest paid by owners to banks or other financial institutions on the property.

Repairs—Expenses including costs for incidental repairs, flooring repairs, and costs for keeping the property in operating condition.

Supplies—Cost of non-incidental materials and items, such as office and cleaning supplies.

Property taxes—Amount paid for property taxes.

Utilities—Expenses including internet, phone, electricity, gas, water, sewer, and trash.

Depreciation expense—Annual non-cash expense used to recover the loss in value of an asset.

Other expenses—Expenses that do not easily fall within an existing expense category.

Reserves for replacement—Allowance or reserve for the replacement of short-lived items that will not last for the remaining economic life of a property.

Capital expenses—Expenses that do not typically occur on an annual basis. Examples include roof replacement, building addition, parking lot replacement, air conditioner replacement, etc.

Ground rent paid—Rent paid for land that is separate from a building such as rent paid for vacant land used for a car lot or rent paid for leased land under a building.

Lease Type—(For use in General Commercial Use section) Lease types include graduated, long term, month to month, renewal, short term, triple net, owner occupied, or vacant.