

Return to: City of Anytown  
Assessors Office  
1 Main Street  
Anytown, USA 00000

**INCOME AND EXPENSE QUESTIONNAIRE CITY OF ANYTOWN**

Please indicate all income as fully rented (items 7-13). If the property is owner occupied, enter the expenses. To determine line 15 (vacancy & bad debt), subtract actual income from "Total Potential Income" (line 14).

<u>PROPERTY DATA</u>			
PROPERTY NAME:			
PROPERTY ADDRESS:			
1. GROSS BLDG. AREA _____	SF	4. NO. OF UNITS _____	
2. NET LEASABLE AREA _____	SF	5. LAND AREA _____	
3. OWNER OCCUPIED AREA _____	SF	6. BLDG. AGE _____	

<u>INCOME</u>	<u>INCOME DATA</u>	<u>YR XXXX</u>	<u>YR XXXX</u>
7. Apartment Rentals .....	\$ _____	\$ _____	\$ _____
8. Office Rentals .....	\$ _____	\$ _____	\$ _____
9. Retail Rentals .....	\$ _____	\$ _____	\$ _____
10. Industrial/Warehouse/Garage Rentals .....	\$ _____	\$ _____	\$ _____
11. Room Rentals .....	\$ _____	\$ _____	\$ _____
12. Other Rentals .....	\$ _____	\$ _____	\$ _____
13. Parking Rental .....	\$ _____	\$ _____	\$ _____
<b>14. Total Potential Income (add lines 7 to 13) .....</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
15. Loss due to Vacancy & Bad Debt .....	\$ _____	\$ _____	\$ _____
<b>16. Effective Annual Income (line 14 minus line 15) .....</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
17. Expense Reimbursements .....	\$ _____	\$ _____	\$ _____

<u>EXPENSES</u>		
18. Management .....	\$ _____	\$ _____
19. Leasing Fees/Commissions/Advertising .....	\$ _____	\$ _____
20. Legal/Accounting .....	\$ _____	\$ _____
21. Heat/Air Conditioning .....	\$ _____	\$ _____
22. Electricity .....	\$ _____	\$ _____
23. Other Utilities .....	\$ _____	\$ _____
24. Payroll (except mgmt.) .....	\$ _____	\$ _____
25. Supplies (janitorial, etc.) .....	\$ _____	\$ _____
26. Maintenance & Repairs .....	\$ _____	\$ _____
27. Common Area Maintenance .....	\$ _____	\$ _____
28. Elevator Maintenance .....	\$ _____	\$ _____
29. Snow/Trash Removal .....	\$ _____	\$ _____
30. Other (Specify _____) .....	\$ _____	\$ _____
31. Other (Specify _____) .....	\$ _____	\$ _____
32. Fire/Liab. Insurance .....	\$ _____	\$ _____
33. Reserves for Replacement .....	\$ _____	\$ _____
34. Security .....	\$ _____	\$ _____
<b>35. TOTAL EXPENSES (Add lines 18 to 34) .....</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b>36. NET OPERATING INCOME (Line 16 &amp; 17 minus line 35) ..</b>	<b>\$ _____</b>	<b>\$ _____</b>
37. Real Estate Taxes .....	\$ _____	\$ _____
38. Mortgage Payments (Principle and Interest) .....	\$ _____	\$ _____

Signed: \_\_\_\_\_ Dated: \_\_\_\_\_  
 Signature of Owner or Preparer

Print Name and Title \_\_\_\_\_ Telephone No. with Area Code \_\_\_\_\_

**ANNUAL RENTAL DATA**

TENANT'S NAME:	LEASABLE AREA SF	TYPE OF LEASE OR TAW	TERM OF LEASE:		ANNUAL BASE RENT	ANNUAL ADDITIONAL PAYMENTS	ANNUAL AVG. VACANCY
			FROM:	TO:			
1							
2							
3							
4							
5							
6							
7							
8							

**MARKET DATA**

Purchased Land Only \$ \_\_\_\_\_ Purchased Land & Bldgs.\$ \_\_\_\_\_  
 Date of Purchase \_\_\_\_\_ Cash Down Payment \$ \_\_\_\_\_  
 Mortgage \$ \_\_\_\_\_ Interest Rate \_\_\_\_\_ % Term/Years \_\_\_\_\_  
 Other Mortgage \$ \_\_\_\_\_ Interest Rate \_\_\_\_\_ % Term/Years \_\_\_\_\_  
 Did purchase price include payment for furniture? \$ \_\_\_\_\_ or Equipment? \$ \_\_\_\_\_  
 Has property been listed for sale since your purchase? \$ \_\_\_\_\_ (Asking Price) \_\_\_\_\_ (Date Listed) \_\_\_\_\_  
 Remarks (circumstances or reasons for purchase): \_\_\_\_\_

COST DATA	COST	YEAR	DIMENSIONS	COMMENTS
SITE IMPROVEMENTS	\$ _____			
BUILDINGS	\$ _____			
ADDITIONS	\$ _____			
REMODELING	\$ _____			

APARTMENT BUILDINGS & (HOTEL/MOTEL)		
TYPE	NO.	\$ PER MONTH/DAY
EFFICIENCY	_____	@ _____ @ _____ @ _____
1 BEDROOM (SINGLE)	_____	@ _____ @ _____ @ _____
2 BEDROOM (DOUBLE)	_____	@ _____ @ _____ @ _____
3 BEDROOM (TRIPLE)	_____	@ _____ @ _____ @ _____
JANITOR/MANAGER	_____	@ _____
GARAGE/CARPORT	_____	@ _____
OTHER INCOME	_____	@ _____

EXPENSE RESPONSIBILITIES	
TENANT	OWNER
CLEANING	.....
RUBBISH REMOVAL	.....
BUILDING MAINT	.....
PARKING LOT MAINT	.....
INSURANCE	.....
REAL ESTATE TAXES	.....
HEATING	.....
AIR CONDITIONING	.....
ELECTRIC	.....
WATER	.....
RANGE	.....
REFRIGERATOR	.....
DISHWASHER	.....
DISPOSAL	.....
CARPET	.....
DRAPES	.....
FURNITURE	.....
.....	.....
.....	.....