



STATE OF FLORIDA
LEE COUNTY PROPERTY APPRAISER
KENNETH M. WILKINSON, C.F.A.



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2480 Thompson Street
Fort Myers, Florida 33901-3074
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APARTMENTS

Income Questionnaire Instructions

Note: All information that you submit in response to this questionnaire will be held in strict confidence, as mandated by Florida Statute 195.027.

It is my responsibility as your Lee County Property Appraiser to annually determine the market value of all property in our county.

In order to achieve the greatest possible accuracy in the valuation of Apartments (an income-driven property) this office each year conducts an income and expense survey. This survey information will be analyzed for the identification of market conditions in year 2011, and most importantly your specific property conditions and financial operation.

All supported information generated by this survey will be used to develop typical appraisal parameters and valuation models for Apartments in Lee County.

If you fail to respond to this survey, the Lee County Property Appraiser will be required to assess your property utilizing strictly market parameters, as we would not have your specific financials when preparing valuation models and finalizing the Tax Roll. **Failure to submit the requested income data by April 30th, 2012 will preclude the Lee County Property Appraiser from considering the income data for the current tax year.**

If you would like assistance in completing the *income questionnaire*, you may contact:
LESLEE MONIZ at (239) 533-6126, or e-mail MonizL@Leepa.org of the Commercial Department.

TANGIBLE PERSONAL PROPERTY (TPP) INSTRUCTIONS

Apartment owners must file a **DR-405** Return by 4/1/12 for TPP assets. These include but are not limited to ranges, refrigerators, dishwashers, ceiling fans, garbage disposals, signage, furniture, office furniture equipment, lawn & maintenance equipment, health & recreation equipment etc. as required by 193.114, Florida Statutes. If you have any questions, or if you need assistance, please contact: **TANGIBLE DEPARTMENT 239-533-6140**, or e-mail tpp@Leepa.org.

Thank you in advance for your anticipated cooperation.

Respectfully requested,

A handwritten signature in cursive script that reads "K. M. Wilkinson".

Kenneth M. Wilkinson, C.F.A.
Lee County Property Appraiser

APARTMENTS

INCOME & EXPENSE QUESTIONNAIRE
 FOR PERIOD BEGINNING 01/01/11 AND ENDING 12/31/11
RESPONSE DEADLINE: April 30, 2012

PLEASE ATTACH THE FOLLOWING AND COMPLETE THIS FORM
These Documents should represent performance from 01/01/11 to 12/31/11

- Rent Roll (12 Month History)
- Year End Income and Expense Statement, Profit & Loss, Cash Flow or Operating Statements
- Include detail for Reserve, Replacements and Maintenance & Repairs

STRAP: _____ **OWNER NAME:** _____

SITE ADDRESS: _____

NAME OF APARTMENT COMPLEX: _____

TOTAL NUMBER OF UNITS: _____

ARE THE UNITS RENTED FURNISHED: Yes _____ No _____

IF YES, PLEASE EXPLAIN: _____

ANNUAL PERCENTAGE OF VACANCY & COLLECTION LOSS: _____ %

EFFECTIVE GROSS INCOME:

TOTAL INCOME COLLECTED FROM ALL SOURCES ENDING 12/31/11 \$ _____

Unit Mix & Rates

STUDIO/EFFICIENCY	# _____	@	\$ _____
1 BEDROOM/ 1 BATH	# _____	@	\$ _____
2 BEDROOM/ 1 BATH	# _____	@	\$ _____
2 BEDROOM/ 2 BATH	# _____	@	\$ _____
3 BEDROOM/ 2 BATH	# _____	@	\$ _____

COMPLETED BY: _____

DATE: ____/____/____ **PHONE:** () _____

EMAIL ADDRESS: _____