



STATE OF FLORIDA
LEE COUNTY PROPERTY APPRAISER
MATTHEW H. CALDWELL



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January 12, 2024

«name»
«careof»
«address1»
«address2»
«city» «state» «zip»

«Barcode» «folioid»

«Personalized Code: **«Lori'sCode»**»

Re: Income and Expense Questionnaire

Dear Property Owner/Manager:

Each year the Lee County Property Appraiser's office is required to determine the market value of all property in our county as of January 1. Due to Hurricane Ian, your property and business may have been significantly impacted. If Hurricane Ian impacted your business and its operations, please let us know so that we can reflect the status in our records. Additionally, each year, we ask commercial property owners to provide us with data relative to the operation of their business to assist us in our valuation process. Your information will be compared with all other similar properties and used to develop market rates for the entire class of properties. Participation by individual owners ensures that we accurately value all commercial properties in Lee County.

On the back of this letter is a form that details the type of information we are looking for in your type of business. In lieu of completing the form, you may use our online portal at www.leepa.org to report your hurricane damage and upload your income information. Simply enter your personalized code above on our home page, and we will walk you through the process. Feel free to upload a copy of your 2023 income and expense statement, rent roll, property brochure, or other applicable information prepared by your accountant or bookkeeper. Any income information you provide is confidential and will not be disclosed.

If you purchased or sold the property before December 31, feel free to enclose a copy of your closing statement that details the costs involved with the sale of the property and any allocations that were made for any tangible personal property (FF&E). This information helps in the verification of the sales transaction and ensures that we treat the sales transaction properly.

To ensure that we have adequate time to process and analyze the data, please submit your 2023 income and expense information as soon as you are able. Taxpayers generally submit their information to us when they have their taxes prepared, so we ask that you try to get it to us as soon as it's convenient.

If you do not use online reporting, kindly return the form and any other information using the postage-paid envelope provided, by e-mail attachment to nunezj@leepa.org, or fax it to (239) 533-6091. Thank you in advance for your cooperation. If you have any questions or need additional information, please contact Jorge Nunez at (239) 533-6228 or send an email to nunezj@leepa.org.

Sincerely,

Matt Caldwell
Lee County Property Appraiser

INCOME AND EXPENSE STATEMENT FOR MARINA PROPERTIES

For Year Ended 2023

PLEASE ATTACH RENT ROLL AND PROFIT AND LOSS STATEMENT**

**IN LIEU OF FILLING OUT THIS FORM, PLEASE PROVIDE A RATE SHEET

Marina Type (checkmark applicable type)	Marina Amenities (checkmark applicable amenity)	Riparian Rights (checkmark applicable right)	Total Income (\$)		
			Boat Storage	Boat Launches	Daily/Temp Wet Slips
Recreational	Dock Masters' Off.	Granted			
Commercial	Restaurant/Bar	Leased			
Yacht Club	Ships Store	Terms of Lease			
Other	Fuel Pumps	Utility Hookups	Yes/No	Dock Type	Yes/No
	Club House	Electric		Concrete	
	Pool/Spa	Water		Wood	
	Shower Facilities	Sewer		Floating	
	Boat Wash Facilities	Telephone/Cable		Other	
	On-Site Parking				
Total Annual Boat Storage Income					
	Wet Slips	Dry Racks	Open Air Racks	Open Storage	
Total # Slips					
Rent/LF					
Min Boat FT					
Max Boat FT					
Avg Boat FT					
# Vacancies					
Annual Building Lease (s) Income					
	Building Size SF	Annual Rent \$	Terms of Lease		
Restaurant (s)					
Retail Outlets (s)					
Office Space (s)					
Total Annual Expenses					
1.) Utilities					1
2.) Property Insurance					2
3.) Management Fees					3
4.) Maintenance and Repairs					4
5.) Salaries					5
6.) Advertising/Marketing					6
7.) Riparian Rights					7
8.) Supplies					8
9.) Reserves for Replacements (please explain)					9
Submitted By (please print):					
Telephone:			Date:		
Email:					
Property Address:					