

MULTI TENANT OFFICES

INCOME AND EXPENSE QUESTIONNAIRE
FOR PERIOD BEGINNING **1/1/09** AND ENDING **12/31/09**
PLEASE RESPOND BY **MARCH 31, 2010**

NAME OF OFFICE BUILDING: _____
THE PROPERTY APPRAISER IS REQUESTING THE FOLLOWING INFORMATION

(A)- A COMPLETE RENT ROLL AS OF **JANUARY 1, 2010** INDICATING:

- 1- TOTAL LEASABLE AREA (INCLUDE ALL VACANT AREAS) _____ SF
- 2- MINIMUM BASE RENT PER SQUARE FOOT \$ _____
- 3- ADDITIONAL RENT PER SQUARE FOOT FOR OTHER CHARGES \$ _____
(COMMON AREA MAINTENANCE)
- 4- BEGINNING & EXPIRATION DATES OF THE LEASES- **PLEASE ATTACH RENT ROLL**

(B)- ANNUAL PERCENTAGE OF VACANCY & COLLECTION LOSS: _____ %

(C)- **PROFIT & LOSS STATEMENT** OF THE SUBJECT PROPERTY

*The statement submitted should be representative of all income & expenses associated with the performance during **1/1/09** to **12/31/09***

TOTAL INCOME FROM ALL SOURCES: \$ _____

EXPENSES

UTILITIES	\$ _____
PROPERTY INSURANCE	\$ _____
MANAGEMENT FEES	\$ _____
MAINTENANCE & REPAIRS	\$ _____
SALARIES	\$ _____
ADVERTISING / MARKETING	\$ _____
SUPPLIES	\$ _____
RESERVES FOR REPLACEMENTS (SPECIFY)*	\$ _____

TOTAL OPERATING EXPENSES \$ _____

*Please specify what is included in the **RESERVES FOR REPLACEMENTS** expense category. Failure to specify this item may exclude those expenses from being considered.

ARE RENTAL CONCESSIONS BEING OFFERED: Yes _____ No _____

IF YES, PLEASE EXPLAIN: _____

COMPLETED BY: _____ DATE: ___/___/___ PHONE: () _____

If you wish to supply the requested data in another format (*i.e., year end income and expense statement, profit & loss or operating statement, etc.*) please attach it to this form and return it to our office at your earliest convenience. **Individually strapped parcels are appraised as individual properties and may not be valued in conjunction with other parcels. Do not combine income/expense information and rent rolls of more than one strapped parcel.**



STATE OF FLORIDA
LEE COUNTY PROPERTY APPRAISER
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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 Office Building properties (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 2009 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 Office Building's 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 March 31st, 2010 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 David Hendren at (239) 533-6228 or e-mail Hendrend@leepa.org of the Commercial Department.

TANGIBLE PERSONAL PROP (TPP) INSTRUCTIONS

INSTRUCTIONS FOR FILING

TANGIBLE PERSONAL PROPERTY RETURN DR-405

Office Complex owners must file a DR-405 return by 4/1/10 for TPP assets. These include but are not limited to office/lobby/conference room furniture & equipment, signage, maintenance equipment, cameras, décor, etc as required by 193.114, Florida Statutes. A DR-405 will be mailed to you. If you do not receive this form by January 15, 2010, if you have any questions, or if you need assistance, please contact:

DEBORAH A. MAIER (239) 533-6142, or e-mail MaierD@Leepa.org.

Thank you in advance for your anticipated cooperation.

Respectfully requested,

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