



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



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Fort Myers, Florida 33901-3074
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www.leepa.org

Multi Tenant Offices

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 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 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, 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 **David Hendren** at (239) 533-6228 or e-mail Hendrend@leepa.org of the Commercial Department.

Tangible Personal Property (TPP) DR 405 Return Filing Instructions

Office Facilities owners must file a **DR-405 Return** by 04/01/12 for TPP assets. These include but are not limited to office furniture & equipment, signage, 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.

Respectfully requested,

A handwritten signature in black ink, appearing to read "K. M. Wilkinson".

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

Multi Tenant Offices

INCOME & EXPENSE QUESTIONNAIRE
FOR PERIOD BEGINNING 01/01/11 AND ENDING 12/31/11
PLEASE RESPOND BY MARCH 31,2012

STRAP: _____ OWNER NAME: _____

SITE ADDRESS: _____

Name of Office Building: _____

The property appraiser is requesting the following information:

1. A complete Profit & Loss Statement and Rent Roll as of January 1, 2012:
2. Total Leasable Area (Include ALL Vacant Areas) _____ SF
3. Minimum Base Rent Per Square Foot- \$ _____
4. Additional Rent Per Square Foot for other charges \$ _____ (Common Area Maintenance)
5. Beginning & Expiration Dates of Leases – *(Please Attach Rent Roll)*
6. Annual Percentage of Vacancy & Collection Loss _____%
7. Profit & Loss Statement of the Subject Property
 - a. Statement submitted should be representative of all income & expenses associated with the performance during 01/01/11 to 12/31/11.

Total Income From ALL Sources \$ _____

EXPENSES

Utilities	\$ _____	Property Insurance	\$ _____
Management Fees	\$ _____	Maintenance & Repairs	\$ _____
Salaries	\$ _____	Advertising / Marketing	\$ _____
Supplies	\$ _____	Reserves for Replacements	\$ _____

(SPECIFY BELOW*)

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.**