



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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Personal Storage Facilities Income & Expense Questionnaire

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 Storage Facility 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 Storage Facilities 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 **MARC SASSO** at (239) 533-6204 or e-mail **Sassom@Leepa.org** of the Commercial Department.

Tangible Personal Property(TPP) DR 405 Return Filing Instructions

Storage 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, tools, signage, gates, cameras, 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

Office-Warehouse and Warehouse Facilities

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

STRAP: _____ OWNER NAME: _____

SITE ADDRESS: _____

NAME OF FACILITY: _____

TOTAL LEASEABLE A/C SF = _____ SF

TOTAL LEASEABLE NON A/C SF = _____ SF

TOTAL OUTDOOR STORAGE SPACES: _____ RENTAL RATE: \$ _____

TOTAL COVERED STORAGE SPACES: _____ RENTAL RATE: \$ _____

Unit Type	Avg Unit Size SF	Rental Range	
		From	To
Non AC			
Less than 300sf	_____	\$ _____	\$ _____
Non AC			
More than 300sf	_____	\$ _____	\$ _____
A/C			
Less than 300sf	_____	\$ _____	\$ _____
A/C			
More than 300sf	_____	\$ _____	\$ _____

INCOME

TOTAL PERSONAL STORAGE INCOME = \$ _____

TOTAL OUTDOOR STORAGE INCOME = \$ _____

TOTAL COVERED STORAGE INCOME = \$ _____

TOTAL OTHER INCOME = \$ _____

ANNUAL PERCENTAGE OF VACANCY & COLLECTION LOSS: _____%

EXPENSES

Utilities \$ _____ Property Insurance \$ _____

Management Fees \$ _____ Maintenance & Repairs \$ _____

Salaries \$ _____ Advertising / Marketing \$ _____

Supplies \$ _____ *Reserves For Replacements \$ _____

TOTAL OPERATING EXPENSES \$ _____

***Please specify what is included in the RESERVES FOR REPLACEMENTS 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: _____ TITLE: _____

DATE: _____ PHONE: () _____