



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



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Outside 239 Area Code: 1-866-673-2868

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2480 Thompson Street
Fort Myers, Florida 33901-3074
Facsimile: (239) 533-6091
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Shopping Centers

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 Retail 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 Retail Stores 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:
SHERRY BARTGIS at (239) 533-6461 or e-mail bartgiss@Leepa.org of the Commercial Department.

Thank you in advance for your anticipated cooperation.

Respectfully requested,

A handwritten signature in black ink that reads "K. M. Wilkinson".

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

Shopping Centers

STRAP: _____ OWNER NAME: _____

SITE ADDRESS: _____

Name of Center/Plaza _____

Individually “STRAPPED” parcels are appraised as individual properties and may not be valued in conjunction with other parcels. Do not combine Income or Expense information for one parcel with another parcel.

For Jan 1, 2011 thru Dec 31, 2011

Directions:

1. **ATTACH A DETAILED RENT ROLL** Be specific with unit size leased, tenant name, lease dates, base rent \$ paid, CAM \$ paid and what CAM \$ cover. Please separate \$ Sales Tax and \$ CAM (Common Area Maintenance), if applicable.
2. **ATTACH P&L STATEMENT** or complete the Operating Expenses table below. Please be specific regarding your expenses and who is responsible for which expense, ie, tenant or owner.
3. **Itemize any repairs** completed or unusual expenses encountered.
4. **Itemize any monies** set aside for Reserves for Replacements.
5. **Detail** any rental concessions necessary to keep existing tenants or obtain new tenants.
6. **Return this form** and the attached support documents in the enclosed envelope prior to **March 31, 2012.**
7. Thank you for your participation

Please direct questions to Sherry Bartgis at 239-533-6461 or by Email to: bartgiss@LeePA.org

INCOME Jan 1, 2011 thru Dec 31, 2011

- Total Income – all sources \$ _____
- Base Rent Paid \$ _____
- CAM Rent Paid \$ _____

VACANCY Jan 1, 2011 thru Dec 31, 2011

- Estimated annual vacancy (%) _____ %

OPERATING EXPENSES

Management Fees	\$ _____	Property Insurance	\$ _____
Utilities	\$ _____	Trash	\$ _____
* Repairs & Maintenance	\$ _____	** Reserves for Replacement	\$ _____
Advertising & Marketing	\$ _____	Leasing Commissions	\$ _____
Grounds Maintenance	\$ _____		
* Itemized Repairs & Maintenance	_____		

** Itemized Reserves: _____

Completed by: _____ Phone#: _____

Email: _____