

Annual Expenses for Apartments & Rooming Houses

Parcel ID:	Location:		Expenses for Calendar Year: 20__
	Property Use:		(Last Year)
USE CODE: _____	Owner Amount	Tenant Amount (if applicable)	Expense Description:
<u>Management & Administrative</u>			Costs to maintain 100% tenant occupancy
Management	\$	\$	Costs for property management overall, owner or professional service
Administrative/Salaries	\$	\$	Costs for staffing of secretary and/or leasing agent
Marketing/Promotion	\$	\$	Costs for advertising, phones, fliers to gain tenants
Legal Services	\$	\$	Costs for property-related legal advice, contract writing, etc.
<u>Maintenance & Cleaning</u>			Costs to keep the property presentable, accessible & clean
Contracted Grounds keeping	\$	\$	Service for mowing, plant trimming, fertilizing, mulching, raking, etc.
Contracted Snow Removal	\$	\$	Service for clearing driveways, sidewalks & parking after snowfalls
Contracted Trash Removal	\$	\$	Service for trash pick-up
Contracted Janitorial/Specialty	\$	\$	Service for cleaning windows, pools, laundry rooms, exterminator
Property Supplies	\$	\$	Cleaning supplies, hand tools, things used to support the property
<u>Repairs & Refurbishment</u>			Expenses yearly for basic property maintenance-not major repairs
Exterior/Interior	\$	\$	Typical painting, trim, glass & screen repair, drawers/door repair
Electrical, Plumbing, Mechanical	\$	\$	Fixture replacements, plumbing leaks, air cond. repair, heater repair
Common Area	\$	\$	Pool fences/gates, sidewalk repair, signs
<u>Utilities</u>			Reports office/clubhouse/laundry bldg/pool/common area costs
Electricity	\$	\$	If not included in rent, leave tenant amount blank unless cost is known
Gas/Oil	\$	\$	If not included in rent, leave tenant amount blank unless cost is known
Water/Sewer	\$	\$	If not included in rent, leave tenant amount blank unless cost is known
<u>Other Expenses</u>			
Property Insur. (1 year, real estate only)	\$	\$	Cost for annual property insurance premium only (no cars, boats, etc.)
Reserves for Replacements	\$	\$	Budgeted annually for future costs like new roof, appliances, flooring
Other (describe):	\$	\$	
Other (describe):	\$	\$	
Total	\$	\$	Note: Debt service (mortgage), real estate taxes and depreciation are NOT allowable expenses since they vary significantly between properties & investors.
Comments:			

Annual Income For Apartments and Rooming Houses

APARTMENT USE PROPERTY RENTAL INCOME STATEMENT	Location:	Calendar Year: 20__ Last Year
	Parcel ID:	

Note: You may attach an annual rent roll as long as it includes **ALL** of the same information requested below. More forms available on Assessor's Website.

Occupancy Information:									
Floor Level: (1 st , 2 nd , 3 rd , Basement, House)	#Bedrooms/ #Baths	Heat Included? (Y/N)	Electricity Included? (Y/N)	Furnished or Unfurn.? (F/U)	Trash Service Included? (Y/N)	Parking Included? (Y/N)	Lease Start/End Dates (mo/day/yr) Or Tenant-at-Will (TAW)	Monthly Rent	Total Annual Rent (All 12 mos.)
							Begin: /End:	\$	\$
							Begin: /End:	\$	\$
							Begin: /End:	\$	\$
							Begin: /End:	\$	\$
							Begin: /End:	\$	\$
							Begin: /End:	\$	\$
							Begin: /End:	\$	\$
							Begin: /End:	\$	\$

Property Summary	# of Units	Avg. Monthly Rent	# Units with some Vacancy last year	Total # of months vacant last year (all units)	# of Units Owner/Family Occupied	Parking Information	Total # of Spaces	Single Space Monthly (if extra charge to tenant)
Studio		\$				Garage or Covered Parking		\$
One		\$				Open Space Parking		\$
Two		\$				Total:		
Three		\$				Comments:		
House or Cottage		\$						
Total # of Units:								

I certify under the pains and penalties of perjury that the information supplied herewith is true and correct (all lines below MUST be completed) and that this information has been submitted to the Assessors Office within the 60 day deadline as required by law:

Submitted by (Print Name): _____ Title: _____ Phone#: _____

Signature: _____ Date: _____