

ANNUAL INCOME AND EXPENSE SUMMARY REPORT

Parcel ID:		Calendar Year: 2023	
Property Address:		Mailing Address:	
Owner:		City/State/Zip:	
1. Primary Property Use: Apartment ___ Office: ___ Retail ___ Industrial ___ Mixed Use ___ Other ___			
2. Gross Building Area (Sq. feet)		6. Number of Units	
3. Net Leasable Area (Sq. feet)		7. Number of Parking Spaces	
4. Owner Occupied Area (Sq. feet)		8. Actual Year Built	
5. Common Area (Sq. feet)		9. Year Remodeled	

ANNUAL INCOME		ANNUAL EXPENSES	
10. Apartment Rentals (Sched. A)	\$	22. Advertising	\$
11. Office Rentals (Sched. B)	\$	23. Cleaning and Maintenance (Includes Snow Removal and Trash Removal)	\$
12. Retail Rentals (Sched. B)	\$	24. Commissions/Leasing Fees	\$
13. Industrial Rentals (Sched. B)	\$	25. Insurance (Building Only)	\$
14. Mixed Use Rentals (Sched. C)	\$	26. Professional & Legal Fees	\$
15. Other Rentals	\$	27. Management/Admin Fees	\$
16. Parking Rentals	\$	28. Repairs and Maintenance	\$
17. Common Area Maint. (CAM)	\$	29. Supplies	\$
18. Other Property Income (billboard, cell tower, etc.)	\$	30. Utilities (paid by owner)	\$
19. Total Potential Gross Income	\$	31. Other	\$
20. Vacancy and Collection Loss	\$	32. Reserves for Replacement	\$
21. Effective Gross Annual Income (Subtract Line 20 from Line 19)	\$	33. Total Expenses Add lines 22 to 33	\$

I certify under the pains and penalties of perjury that the information supplied herewith is true and correct

Submitted by: _____ Title: _____ Phone: _____

Signature: _____ Date: _____

The above identified property is owner occupied _____

The above identified property is leased to a related person, corporation, or business entity _____

Failure to timely submit response will result in penalty.

Penalty: Class One, residential: \$50 Class Three, commercial & Class Four, industrial: \$250

SCHEDULE B: Commercial & Industrial Rental Income

Property Location:	COMMERCIAL & INDUSTRIAL PROPERTY	Income for Calendar Year: 2023
Parcel ID:	Lease / Rental Terms	Submitted By:

Tenant Name	Use	Floor Level	Leased Area (Sq. Ft.)	Gross, Net Or NNN	Lease Start Date (Month/Yr.)	Lease End Date (Month/Yr.)	Renewal Options	Overage or Percentage	Escalation Clause	Monthly Rent	Annual Rent

OTHER INCOME: Cell Towers, Billboards, Vending, Parking, Other

Source	Monthly Amount	Annual Collected	Comments:
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	

COPY AND ATTACH ADDITIONAL PAGES (IF NEEDED)