

Return to: City of Taunton  
 Office of the Assessor  
 141 Oak Street  
 Taunton, Ma 02780

**INCOME AND EXPENSE QUESTIONNAIRE  
 CITY OF TAUNTON, MA**

|                                 |                       |
|---------------------------------|-----------------------|
| <b>PROPERTY DATA</b>            |                       |
| PROPERTY NAME: _____            |                       |
| PROPERTY ADDRESS: _____         |                       |
| MAP/BLOCK/LOT: _____            |                       |
| 1. GROSS BLDG. AREA _____ SF    | 4. NO. OF UNITS _____ |
| 2. NET LEASABLE AREA _____ SF   |                       |
| 3. OWNER OCCUPIED AREA _____ SF | 5. BLDG. AGE _____    |

| <u>INCOME</u>   | <u>RENTAL DATA</u> | <u>YR 2010</u>  | <u>YR 2011</u>  |
|---|--------------------|-----------------|-----------------|
| 7. Apartment Rentals .....  |                    | \$ _____        | \$ _____        |
| 8. Office Rentals .....   |                    | \$ _____        | \$ _____        |
| 9. Retail Rentals .....   |                    | \$ _____        | \$ _____        |
| 10. Industrial/Warehouse/Garage Rentals .....                       |                    | \$ _____        | \$ _____        |
| 11. Room Rentals .....  |                    | \$ _____        | \$ _____        |
| 12. Other Rentals .....   |                    | \$ _____        | \$ _____        |
| 13. Parking Rental .....  |                    | \$ _____        | \$ _____        |
| <b>14. Total Potential Income (add lines 7 to 13) .....</b>         |                    | <b>\$ _____</b> | <b>\$ _____</b> |
| 15. Loss due to Vacancy & Bad Debt .....                            |                    | \$ _____        | \$ _____        |
| <b>16. Effective Annual Income (line 14 minus line 15) .....</b>    |                    | <b>\$ _____</b> | <b>\$ _____</b> |
| 17. Expense Reimbursements .....                                    |                    | \$ _____        | \$ _____        |
| <br><b>EXPENSES</b>   |                    |                 |                 |
| 18. Management .....  |                    | \$ _____        | \$ _____        |
| 19. Leasing Fees/Commissions/Advertising .....                      |                    | \$ _____        | \$ _____        |
| 20. Legal/Accounting .....  |                    | \$ _____        | \$ _____        |
| 21. Heat/Air Conditioning .....                                     |                    | \$ _____        | \$ _____        |
| 22. Electricity .....   |                    | \$ _____        | \$ _____        |
| 23. Other Utilities .....   |                    | \$ _____        | \$ _____        |
| 24. Payroll (except mgmt.) .....                                    |                    | \$ _____        | \$ _____        |
| 25. Supplies (janitorial, etc.) .....                               |                    | \$ _____        | \$ _____        |
| 26. Maintenance & Repairs .....                                     |                    | \$ _____        | \$ _____        |
| 27. Common Area Maintenance .....                                   |                    | \$ _____        | \$ _____        |
| 28. Elevator Maintenance .....                                      |                    | \$ _____        | \$ _____        |
| 29. Snow/Trash Removal .....  |                    | \$ _____        | \$ _____        |
| 30. Other (Specify _____) .....                                     |                    | \$ _____        | \$ _____        |
| 31. Other (Specify _____) .....                                     |                    | \$ _____        | \$ _____        |
| 32. Fire/Liab. Insurance .....                                      |                    | \$ _____        | \$ _____        |
| 33. Reserves for Replacement .....                                  |                    | \$ _____        | \$ _____        |
| 34. Security .....  |                    | \$ _____        | \$ _____        |
| <b>35. TOTAL EXPENSES (Add lines 18 to 34) .....</b>                |                    | <b>\$ _____</b> | <b>\$ _____</b> |
| <b>36. NET OPERATING INCOME (Line 16 &amp; 17 minus line 35) ..</b> |                    | <b>\$ _____</b> | <b>\$ _____</b> |
| 37. Real Estate Taxes .....   |                    | \$ _____        | \$ _____        |
| 38. Mortgage Payments (Principle and Interest) .....                |                    | \$ _____        | \$ _____        |

Signed: \_\_\_\_\_ Tel.# ( ) \_\_\_\_\_  
 Signature of Owner

Print Name and Title \_\_\_\_\_ Date: \_\_\_\_\_

**ANNUAL RENTAL DATA**

| TENANT'S NAME: | LEASABLE AREA SF | TYPE OF LEASE OR TAW | TERM OF LEASE:<br>FROM: TO: |  | ANNUAL BASE RENT | ANNUAL ADDITIONAL PAYMENTS | ANNUAL AVG. VACANCY |
|----------------|------------------|----------------------|-----------------------------|--|------------------|----------------------------|---------------------|
| 1              |                  |                      |                             |  |                  |                            |                     |
| 2              |                  |                      |                             |  |                  |                            |                     |
| 3              |                  |                      |                             |  |                  |                            |                     |
| 4              |                  |                      |                             |  |                  |                            |                     |
| 5              |                  |                      |                             |  |                  |                            |                     |
| 6              |                  |                      |                             |  |                  |                            |                     |
| 7              |                  |                      |                             |  |                  |                            |                     |
| 8              |                  |                      |                             |  |                  |                            |                     |

**MARKET DATA**

Purchased Land Only \$ \_\_\_\_\_ Purchased Land & Bldgs.\$ \_\_\_\_\_  
 Date of Purchase \_\_\_\_\_ Cash Down Payment \$ \_\_\_\_\_  
 Mortgage \$ \_\_\_\_\_ Interest Rate \_\_\_\_\_ % Term/Years \_\_\_\_\_  
 Other Mortgage \$ \_\_\_\_\_ Interest Rate \_\_\_\_\_ % Term/Years \_\_\_\_\_  
 Did purchase price include payment for furniture? \$ \_\_\_\_\_ or Equipment? \$ \_\_\_\_\_  
 Has property been listed for sale since your purchase? (Asking Price) \_\_\_\_\_ (Date Listed) \_\_\_\_\_  
 Remarks (circumstances or reasons for purchase): \_\_\_\_\_

| COST DATA         | COST     | YEAR | DIMENSIONS | COMMENTS |
|-------------------|----------|------|------------|----------|
| SITE IMPROVEMENTS | \$ _____ |      |            |          |
| BUILDINGS         | \$ _____ |      |            |          |
| ADDITIONS         | \$ _____ |      |            |          |
| REMODELING        | \$ _____ |      |            |          |

| <b>APARTMENT BUILDINGS &amp; (HOTEL/MOTEL)</b> |       |                  | <b>EXPENSE RESPONSIBILITIES</b>            |                          |
|--|-------|------------------|--|--------------------------|
| TYPE   | NO.   | \$ PER MONTH/DAY | TENANT                                     | OWNER                    |
| EFFICIENCY                                     | _____ | @ _____          | <input type="checkbox"/> CLEANING          | <input type="checkbox"/> |
|  | _____ | @ _____          | <input type="checkbox"/> RUBBISH REMOVAL   | <input type="checkbox"/> |
|  | _____ | @ _____          | <input type="checkbox"/> BUILDING MAINT    | <input type="checkbox"/> |
| 1 BEDROOM<br>(SINGLE)                          | _____ | @ _____          | <input type="checkbox"/> PARKING LOT MAINT | <input type="checkbox"/> |
|  | _____ | @ _____          | <input type="checkbox"/> INSURANCE         | <input type="checkbox"/> |
|  | _____ | @ _____          | <input type="checkbox"/> REAL ESTATE TAXES | <input type="checkbox"/> |
| 2 BEDROOM<br>(DOUBLE)                          | _____ | @ _____          | <input type="checkbox"/> HEATING           | <input type="checkbox"/> |
|  | _____ | @ _____          | <input type="checkbox"/> AIR CONDITIONING  | <input type="checkbox"/> |
|  | _____ | @ _____          | <input type="checkbox"/> ELECTRIC          | <input type="checkbox"/> |
| 3 BEDROOM<br>(TRIPLE)                          | _____ | @ _____          | <input type="checkbox"/> WATER             | <input type="checkbox"/> |
|  | _____ | @ _____          | <input type="checkbox"/> RANGE             | <input type="checkbox"/> |
|  | _____ | @ _____          | <input type="checkbox"/> REFRIGERATOR      | <input type="checkbox"/> |
| JANITOR/MANAGER                                | _____ | @ _____          | <input type="checkbox"/> DISHWASHER        | <input type="checkbox"/> |
| GARAGE/CARPORT                                 | _____ | @ _____          | <input type="checkbox"/> DISPOSAL          | <input type="checkbox"/> |
| OTHER INCOME                                   | _____ | @ _____          | <input type="checkbox"/> CARPET            | <input type="checkbox"/> |
|  |       |                  | <input type="checkbox"/> DRAPES            | <input type="checkbox"/> |
|  |       |                  | <input type="checkbox"/> FURNITURE         | <input type="checkbox"/> |
|  |       |                  | <input type="checkbox"/>                   | <input type="checkbox"/> |
|  |       |                  | <input type="checkbox"/>                   | <input type="checkbox"/> |