



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



**Mailing Address:**  
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**Physical Address:**  
2480 Thompson Street  
Fort Myers, Florida 33901-3074

**Telephone:** (239) 533-6100 -- (866) 673-2868 (From anywhere in continental US/Canada/Florida except 239 area code)  
**Facsimile:** (239) 533-6160 -- **Website:** [www.leepa.org](http://www.leepa.org)

Dear Property Owner/Manager:

Each year the Lee County Property Appraiser's office is required to determine the market value of all property in our county. To assist us in valuing commercial property, we request commercial property owners provide us data relative to the operation of their business. Participation by individual owners ensures that we accurately value all commercial properties in Lee County.

On the back of this letter is a form that details the type of information we are looking for in your type of business. Typically, we use income and expense information in addition to sales transactions in the course of our valuation. Any income information you provide is confidential and is exempt from public disclosure (F.S. 195.027). Once we receive your information, it is combined with all other similar properties and is used to develop market rates for the entire class of properties.

In lieu of filling out the form, feel free to send us a copy of your 2016 income and expense statement, rent roll, property brochure, or other applicable information prepared by your accountant or bookkeeper. If you choose to submit something other than this form, please return this letter with that information so that we can accurately identify the property the data goes with.

If you purchased or sold the property before December 31<sup>st</sup>, feel free to enclose a copy of your closing statement that details the costs involved with the sale of the property and any allocations that may have been made for tangible personal property (FF&E). This information helps in the verification of the sales transaction and ensures that we treat the sales transaction properly.

To ensure that we have adequate time to process and analyze the information submitted, please submit your income and expense information as soon as you are able. Taxpayers generally submit the data to us when they have their taxes prepared, so we ask that you try to get it to us in late March or early April.

Kindly return the form and any other information in the postage paid envelope provided. You may also return it by e-mail attachment and send it to [palmerj@leepa.org](mailto:palmerj@leepa.org), or submit it by fax to (239) 533-6091. Should you have any questions or need assistance please call (239) 533-6109 or email [palmerj@leepa.org](mailto:palmerj@leepa.org).

Thank you in advance for your cooperation.

Sincerely,

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

Kenneth M. Wilkinson, CFA

**INCOME AND EXPENSE STATEMENT FOR PERSONAL STORAGE PROPERTIES**

For Year Ended \_\_\_\_\_

**PLEASE ATTACH RENT ROLL AND PROFIT AND LOSS STATEMENT**

Unit Type	# Of Units		Average Unit Size (sf)		Monthly Rental Range (\$)	
	A/C Units	Non- A/C Units	From	To	From	To
25 SF Or Less						
26 SF to 100 SF						
101 SF to 150 SF						
151 SF to 200 SF						
201 SF to 250 SF						
251 SF to 300 SF						
301 SF to 350 SF						
351 SF to 400 SF						
401 SF to 500 SF						
501 SF to 800 SF						
801 SF Plus						
Other Spaces						
Outdoor Storage Spaces						
Covered Storage Spaces						

**Total Annual Income**

1.) Annual Personal Storage Income	1.
2.) Less Personal Storage Vacancy	2.   %
3.) Annual Outdoor Storage Income	3.
4.) Less Outdoor Storage Vacancy	4.   %
5.) Annual Covered Storage Income	5.
6.) Less Covered Storage Vacancy	6.   %
7.) Retail Store Income (boxes, tape supplies, etc.)	7.
8.) Moving Truck/Trailer Income	8.
9.) Other Income (please explain) _____	9.

**Total Annual Expenses**

10.) Management Fees	10.
11.) Administrative (advertising legal, accounting, etc.)	11.
12.) Payroll	12.
13.) Utilities	13.
14.) Repairs	14.
15.) Insurance Premiums	15.
16.) Reserves for Replacements	16.
17.) Other Expenses (please explain) _____	17.
18.) Real Estate Taxes	18.
19.) Tangible Personal Property Taxes	19.
20.) Other Taxes/Fees	20.
21.) Total Expenses	21.
22.) Capital Expenses (please explain) _____	22.

**Submitted By (please print)** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Property Address:** \_\_\_\_\_