



STATE OF FLORIDA
LEE COUNTY PROPERTY APPRAISER
MATTHEW H. CALDWELL



Mailing Address:
P.O. Box 1546
Fort Myers, Florida 33902-1546
Telephone: (239) 533-6100

Physical Address:
2480 Thompson Street
Fort Myers, Florida 33901-3074
Website: www.leepa.org

Re: Income and Expense Questionnaire

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 as of January 1. Due to Hurricane Ian, your property and business may have been significantly impacted. If Hurricane Ian impacted your business and its operations, please let us know so that we can reflect the status in our records. Additionally, each year, we ask commercial property owners to provide us with data relative to the operation of their business to assist us in our valuation process. Your information will be compared with all other similar properties and used to develop market rates for the entire class of properties. 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. In lieu of completing the form, you may use our online portal at www.leepa.org to report your hurricane damage and upload your income information. Simply enter your personalized code above on our home page, and we will walk you through the process. Feel free to upload a copy of your 2023 income and expense statement, rent roll, property brochure, or other applicable information prepared by your accountant or bookkeeper. Any income information you provide is confidential and will not be disclosed.

If you purchased or sold the property before December 31, 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 were made for any 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 data, please submit your 2023 income and expense information as soon as you are able. Taxpayers generally submit their information to us when they have their taxes prepared, so we ask that you try to get it to us as soon as it's convenient.

If you do not use online reporting, kindly return the form and any other information using the postage-paid envelope provided, by e-mail attachment to nunezj@leepa.org, or fax it to (239) 533-6091. Thank you in advance for your cooperation. If you have any questions or need additional information, please contact Jorge Nunez at (239) 533-6228 or send an email to nunezj@leepa.org.

Sincerely,

A handwritten signature in blue ink, appearing to read "Matt Caldwell".

Matt Caldwell

Lee County Property Appraiser

Income and Expense Statement for Apartment Properties For the Year Ending December 31, 2023

DBA:

Annual Income (In dollars)

Configuration	# Of Units		Avg. sf.	Tot. sf.	Monthly Rent Collected (\$)	Annual Rent Collected (\$)
	# Vacant	# Occupied				
Studio/Efficiency						
1 Bed/1 Bath						
2 Bed/1 Bath						
2 Bed/2 Bath						
3 Bed/2 Bath						
Other						
Garage Rental						
Carport Rental						

Total Annual Gross Income:

Amenities/Restrictions

		Yes	No
1.)	Is this an age-restricted community?		
2.)	Do you receive tax credit for low-income affordable housing, such as LIHTC?		
3.)	If you receive tax credit for low-income affordable housing, please enter the number or the percentage of units that are reduced rentals.	#	%

Annual Expenses (In dollars)

1.)	Management Fees	
2.)	Administrative (including advertising, legal, accounting, etc.)	
3.)	Payroll	
4.)	Electric	
5.)	Water/Sewer	
6.)	Cable	
7.)	Gas (propane/natural)	
8.)	Trash Collection	
9.)	Grounds Maintenance (including landscaping, parking lot, etc.)	
10.)	Janitorial and Building Maintenance	
11.)	Repairs	
12.)	Reserves for Replacements	
13.)	Insurance Premiums	
14.)	Real Estate Taxes	
15.)	Other Taxes and Fees (please explain):	
16.)	Capital Expenses (please explain):	
17.)	Other Expenses (please explain):	
18.)	Total Annual Expenses:	

Contact Information

Submitted by (please print):		Title:
Date:	Telephone:	Email:
Property Address:		