



Official Request  
**RETAIL PROPERTY  
INCOME & EXPENSE SURVEY**

San Patricio County Appraisal District  
361-364-5402

This form is accessible via the San Patricio County Appraisal District's website at [www.sanpatcad.org](http://www.sanpatcad.org)  
If you wish, you may download the form and enter the data via the fillable PDF and submit electronically to  
[PublicInfoRequest@sanpatcad.org](mailto:PublicInfoRequest@sanpatcad.org)

**Dear Property Owner:**

The San Patricio County Appraisal District is in the process of collecting and analyzing information for the reassessment of Warehouse, Industrial, and Storage Property for the calendar year 2020. ***This request is pursuant to the Texas Property Tax Code: Sec.23.01, 23.0101, 23.011, 23.012.*** Please furnish this office with income and expense data for any income producing properties for calendar year 2020. This request for information will be kept strictly **confidential under the stipulation of Sec. 22.27 of the Texas Property Tax Code.**

This survey form is to be completed by the property owner or a duly authorized agent, showing the gross income (at 100% occupancy), vacancies and expenses for the above referenced property. The information should encompass the 2019 calendar year.

In addition to the information requested as part of this survey, we request that you submit any other income or expense information that you believe to be relevant to the assessment of your property. If the property is 100% owner occupied, and therefore not income producing, please state this in writing on the front of the form and return it to our office.

The enclosed self-addressed envelope is provided for your convenience. The income information must be returned to this office no later than **March 17, 2020** or postmarked by the U.S. Postal Service no later than **March 17, 2020**.

If you have any questions regarding this matter, or wish to discuss this request form with a member of our appraisal staff, please call between 8:00a.m. and 5:00p.m., Monday through Friday. ***Your cooperation and timely response to this requirement will be greatly appreciated.***

Sincerely,

Robert Cenci RPA  
Chief Appraiser,

San Patricio County Appraisal District  
Enclosure

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The Income and Expense Information must be placed on this form. No Alternative forms may be used. If you should have questions or need assistance, please call our office at 361-364-5402.

**CERTIFICATION**

State law requires certification by the owner or officially authorized representative. Please type or print all information except signature.

Name of building \_\_\_\_\_

Property address \_\_\_\_\_

Type of project or building \_\_\_\_\_

Owners(s) names(s) \_\_\_\_\_

All information including the accompanying schedules and statements have been examined by me and to the best of my knowledge and belief are true, correct, and complete.

Management firm _____	Phone _____	
Address _____		
Date _____	Signature _____	Title _____
Print Name _____	E-mail _____	

**A. BUILDING INFORMATION**

1. Estimate of Net Leasable Area (NLA) \_\_\_\_\_ (Sq. ft.)
2. Number of Stories \_\_\_\_\_ (Sq. ft.)
3. Below Grade Space \_\_\_\_\_ (Sq. ft.)

**B. PHYSICAL VACANCY INFORMATION**

1. Space Vacant January 1 (2019) \_\_\_\_\_ (Sq. ft. rentable)
2. Space Vacant January 1 (2020) \_\_\_\_\_ (Sq. ft. rentable)

**C. ASKING RENT INFORMATION**

1. Current ASKING rent per sq. ft. for vacant space → \_\_\_\_\_

**D. Has there been a professional appraisal on this real property in the last five years?  Yes  No**

If yes, appraiser's estimate of value \$ \_\_\_\_\_ Date of Value \_\_\_\_\_

**E. ANNUAL INCOME (for calendar year 2019) - Please provide a copy of the rent roll, if applicable.**

1. Potential Rental Income ▶ \_\_\_\_\_
2. Sales of Utilities/Services ▶ \_\_\_\_\_
3. Rental Income: (Specify) ▶ \_\_\_\_\_
4. Income Loss from Vacancy 2019 ▶ \_\_\_\_\_
5. Income Loss from Bad Debt 2019 ▶ \_\_\_\_\_
6. Actual Rental Income Received ▶ \_\_\_\_\_
- OTHER INCOME
7. Common Area Maintenance Reimbursement ▶ \_\_\_\_\_
8. Interest Income ▶ \_\_\_\_\_
9. Insurance Reimbursement ▶ \_\_\_\_\_

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- 10. Operating Expense Reimbursement ▶ \_\_\_\_\_
- 11. Tax Escalation or Reimbursement ▶ \_\_\_\_\_
- 12. Parking and Special Areas ▶ \_\_\_\_\_
- 13. Other Rental Income ▶ \_\_\_\_\_
- 14. Miscellaneous (Specify) ▶ \_\_\_\_\_
- 15. Miscellaneous (Specify) ▶ \_\_\_\_\_
- 16. Miscellaneous (Specify) ▶ \_\_\_\_\_
- 17. Total Other Income (Sum of lines 7 through 16) ▶ \_\_\_\_\_
  
- 18. TOTAL ACTUAL INCOME (Sum of lines 6 and 17) ▶ \_\_\_\_\_

**F. CAPITAL IMPROVEMENTS, RENOVATIONS**

Have there been Capital Improvements or Capital Renovations to the property during this reporting period?

Yes     No    If yes, please provide total cost here and attach a detailed list on a separate page.

**G. ANNUAL OPERATING EXPENSES**

**Utilities:**

- 19. Water and Sewer → \_\_\_\_\_
- 20. Electricity (Excludes HVAC) → \_\_\_\_\_
- 21. Primary Heating Fuel (Specify) → \_\_\_\_\_
- 22. Other Fuel (Specify) → \_\_\_\_\_
- TOTAL UTILITIES → \_\_\_\_\_

**H. MAINTENANCE AND REPAIRS (Excluding Capital Expenditures or Tenant Improvements)**

- 23. Maintenance Payroll (Including Payroll Taxes and Benefits) ▶ \_\_\_\_\_
- 24. HVAC Repairs ▶ \_\_\_\_\_
- 25. Electric/Plumbing Repairs ▶ \_\_\_\_\_
- 26. Elevator Repairs ▶ \_\_\_\_\_
- 27. Roof Repairs ▶ \_\_\_\_\_
- 28. Other Common Area or Exterior Repairs ▶ \_\_\_\_\_
- 29. Miscellaneous Repairs (Specify) ▶ \_\_\_\_\_
- TOTAL MAINTENANCE & REPAIRS ▶ \_\_\_\_\_

**I. MANAGEMENT AND ADMINISTRATIVE:**

- 30. Management Fees ▶ \_\_\_\_\_
- 31. Other Administrative/Payroll (Including Payroll Taxes and Benefits) ▶ \_\_\_\_\_
- 32. Leasing Fees ▶ \_\_\_\_\_
- TOTAL MANAGEMENT AND ADMINISTRATIVE ▶ \_\_\_\_\_

**SERVICES:**

- 33. Janitorial/Cleaning (Payroll/Contract) ▶ \_\_\_\_\_
- 34. Landscape (Grounds Maintenance) ▶ \_\_\_\_\_
- 35. Trash ▶ \_\_\_\_\_
- 36. Security ▶ \_\_\_\_\_
- 37. Snow Removal ▶ \_\_\_\_\_
- TOTAL MANAGEMENT AND ADMINISTRATIVE ▶ \_\_\_\_\_

**J. INSURANCE AND TAXES (Excluding Payroll Taxes):**

- 38. Insurance, Fire, Casualty (One Year) ▶ \_\_\_\_\_
- 39. Other Taxes, Fees ▶ \_\_\_\_\_
- 40. Real Estate Taxes ▶ \_\_\_\_\_
- TOTAL INSURANCE AND TAXES ▶ \_\_\_\_\_

**K. TOTAL OPERATING EXPENSES:**

- 41. Total Expense ▶ \_\_\_\_\_

**NET OPERATING INCOME ▶ \_\_\_\_\_**