

**2009 ANNUAL INCOME AND EXPENSE REPORT SUMMARY**

**Owner Name:** \_\_\_\_\_

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

**Parcel ID:** \_\_\_\_\_

1. Primary Property Use: \_\_\_\_\_

If incorrect or changed, specify \_\_\_\_\_

2. Gross Building Area (Including Owner-Occupied Space) \_\_\_\_\_ Sq. Ft.

6. Number of Parking Spaces \_\_\_\_\_

3. Net Leasable Area \_\_\_\_\_ Sq. Ft.

7. Actual Year Built \_\_\_\_\_

4. Owner-Occupied Area \_\_\_\_\_ Sq. Ft.

8. Year Remodeled \_\_\_\_\_

5. No. of Units \_\_\_\_\_

**INCOME – 2009** (Use Potential Gross Income from Schedules A & B)

**EXPENSES – 2009**

9. Apartment Rental (Totals Schedule A) \_\_\_\_\_

21. Heating / Air Conditioning \_\_\_\_\_

10. Office Rentals (Totals Schedule B) \_\_\_\_\_

22. Electricity \_\_\_\_\_

11. Retail Rentals (Totals Schedule B) \_\_\_\_\_

23. Other Expenses \_\_\_\_\_

12. Mixed Rentals (Totals Schedule B) \_\_\_\_\_

24. Payroll (except management, repair) \_\_\_\_\_

13. Shopping Center Rentals (Totals Schedule B) \_\_\_\_\_

25. Supplies \_\_\_\_\_

14. Industrial Rentals (Totals Schedule B) \_\_\_\_\_

26. Management \_\_\_\_\_

15. Other Rentals (Totals Schedule B) \_\_\_\_\_

27. Insurance \_\_\_\_\_

16. Parking Rentals (Totals Schedule B) \_\_\_\_\_

28. Common Area Maintenance \_\_\_\_\_

17. Other Property Income \_\_\_\_\_

29. Leasing Fees/Commissions/Advertising \_\_\_\_\_

18. **Potential Gross Income** (add line 9 thru line 17) \_\_\_\_\_

30. Legal and Accounting \_\_\_\_\_

19. Income Loss due to Vacancy \_\_\_\_\_

31. Elevator Maintenance \_\_\_\_\_

20. **Effective Annual Income** (line 18 minus line 19) \_\_\_\_\_

32. Security \_\_\_\_\_

33. Amortized Expenses (Apportioned for 2009 year) \_\_\_\_\_

34. Other (specify) \_\_\_\_\_

35. Other (specify) \_\_\_\_\_

36. Other (specify) \_\_\_\_\_

37. **Total Expenses** (add lines 21 thru 36) \_\_\_\_\_

38. Reimbursed Expenses from Tenants  
(Do not include Real Estate Taxes) \_\_\_\_\_

39. **Net Expenses** (line 37 minus line 38) \_\_\_\_\_

40. **Net Operating Income** (line 20 minus line 39) \_\_\_\_\_

41. Capital Expenses \_\_\_\_\_

42. Real Estate Taxes \_\_\_\_\_

43. Mortgage Payment (principal and interest) \_\_\_\_\_

**AFFIDAVITE:**

I DO HEREBY DECLARE UNDER PENALTIES OF FALSE STATEMENT THAT THE FOREGOING INFORMATION, ACCORDING TO THE BEST OF MY KNOWLEDGE, REMEMBRANCE AND BELIEF IS A COMPLETE AND TRUE STATEMENT OF ALL THE INCOME AND EXPENSES ATTRIBUTABLE TO THE ABOVE IDENTIFIED PROPERTY (Section 12-63c (d) of the Connecticut General Statutes).

NAME (Print): \_\_\_\_\_

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

TITLE: \_\_\_\_\_ PHONE: \_\_\_\_\_

**RETURN TO THE ASSESSOR ON/OR BEFORE JUNE 1, 2010 TO AVOID 10% PENALTY**



**IF YOUR PROPERTY IS 100% OWNER-OCCUPIED OR 100% LEASED TO A RELATED CORPORATION, BUSINESS, FAMILY MEMBER OR OTHER RELATED ENTITY, PLEASE INDICATE BY CHECKING THE BOX AND RETURN TO ASSESSOR'S OFFICE.**



# VERIFICATION OF PURCHASE PRICE

(COMPLETE IF THE PROPERTY WAS ACQUIRED ON OR AFTER JANUARY 1, 2009)

Purchase Price \$ \_\_\_\_\_ Down Payment \$ \_\_\_\_\_ Date of Purchase \_\_\_\_\_

(Check one)

1<sup>st</sup> Mortgage \$ \_\_\_\_\_ Interest Rate \_\_\_\_\_ % Payment Schedule Term \_\_\_\_\_ Years  
 2<sup>nd</sup> Mortgage \$ \_\_\_\_\_ Interest Rate \_\_\_\_\_ % Payment Schedule Term \_\_\_\_\_ Years  
 Other \$ \_\_\_\_\_ Interest Rate \_\_\_\_\_ % Payment Schedule Term \_\_\_\_\_ Years

Fixed	Variable

Did the purchase price include a payment for: Furniture: \_\_\_\_\_ Equipment: \_\_\_\_\_ Other (Specify): \_\_\_\_\_

Was the sale between Related Parties: (Circle One) Yes No Approximate vacancy at date of purchase \_\_\_\_\_ %

Was an appraisal used in the purchase of Financing: (Circle One) Yes No Appraised Value: \_\_\_\_\_  
 Name of Appraiser: \_\_\_\_\_

Is property currently listed for sale: (Circle One) Yes No

If property is listed for sale, list asking price: \$ \_\_\_\_\_ Date Listed: \_\_\_\_\_ Broker: \_\_\_\_\_

Remarks – Please explain any special circumstances or reasons concerning your purchase (i.e. Vacancy, conditions of sale, etc.)

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