



**ASSESSMENT
EVALUATIONS, INC.**

REAL ESTATE TAX REDUCTION CONSULTANTS
LICENSED REAL ESTATE BROKER

SCHEDULE "B"

Client: _____
Property Address: _____
Folio Number(s): _____

DOCUMENTATION NEEDED (CIRCLED ITEMS)

1. Subject property income/operating expense statement for 2019 (and for 2018 if available).
2. Detailed rent roll as of 1/1/20. Notations of any rental concessions made, so that we may calculate the net effective rents. Indicate vacant space as of 1/1/20.
3. Square footage information. Breakdown of land, air conditioned improvements, parking, net usable square footage.
4. Conditions which adversely affect the property. Known structural and/or functional defects.
5. Pictures of subject property (front - back - interior).
6. Check for \$_____ (___ folio(s) at \$15.00 per folio number filed), made payable to AEI.
7. Recent appraisal, if available.
8. Date of mortgage, current balance, and amount of insurance.
9. Copy of purchase & sale agreement, closing statement (if recent purchase).
10. Floor/site plan or survey.
11. Construction/build out/renovation costs (if applicable) through 1/1/20.

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