



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 recent hurricanes, your property and business may have been significantly impacted. If either storm 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 2024 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 2024 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 commercial@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 us at (239) 533-6100 and ask for the commercial department or send an email to commercial@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 Senior Care Properties For the Year Ending December 31, 2024

DBA:

Property Type	# of Beds Operating	# of Beds Licensed	% of Annual Occupancy	% Medicaid	% Medicare	% Private
Skilled Nursing Facility						
Assisted Living Facility						
Independent Living Facility						
Memory Care Facility						
Other:						

Annual Income (In dollars)

Facility Type	Room Type	# of Beds	Monthly Rate	\$ Beds Income
Skilled Nursing	Private			
Skilled Nursing	Semi-Private			
Assisted Living	Private			
Assisted Living	Semi-Private			
Independent Living	Private			
Independent Living	Semi-Private			
Memory Care	Private			
Memory Care	Semi-Private			

Other Rental Income (please explain):

Total Annual Income

Annual Expenses (In dollars)

1.) Management Fees	
Is fee based on a percentage of revenue? (Please check yes or no).	<div>Yes</div> <div>No</div>
If you answered yes to the above, please list the percentage of revenue. _____%	
2.) Administrative (including advertising, legal, accounting, etc.)	
3.) Payroll	
4.) Dietary Services/Food and Beverage	
5.) Nursing	
6.) Utilities	
7.) Housekeeping	
8.) Repairs	
9.) Grounds Maintenance (including trash, landscaping, parking lot, etc.)	
10.) Insurance Premiums	
11.) Reserves for Replacements	
12.) Cost of Contracted Resident Services (e.g. therapy, etc.)	
13.) Real Estate Taxes	
14.) Other Taxes/Fees	
15.) Capital Expenses	
16.) Other Expenses (please explain):	
17. Total Annual Expenses	

Contact Information

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