



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](http://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](http://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](mailto: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](mailto: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 MARINA PROPERTIES							
For Year Ended 2024							
PLEASE ATTACH RENT ROLL AND PROFIT AND LOSS STATEMENT**							
**IN LIEU OF FILLING OUT THIS FORM, PLEASE PROVIDE A RATE SHEET							
Marina Type (checkmark applicable type)		Marina Amenities (checkmark applicable amenity)		Riparian Rights (checkmark applicable right)		Total Income (\$)	
						Boat Storage	Boat Launches
Recreational		Dock Masters' Off.		Granted			
Commercial		Restaurant/Bar		Leased			
Yacht Club		Ships Store		Terms of Lease			
Other		Fuel Pumps		Utility Hookups	Yes/No	Dock Type	Yes/No
		Club House		Electric		Concrete	
		Pool/Spa		Water		Wood	
		Shower Facilities		Sewer		Floating	
		Boat Wash Facilities		Telephone/Cable		Other	
		On-Site Parking					
Total Annual Boat Storage Income							
	Wet Slips		Dry Racks		Open Air Racks		Open Storage
Total # Slips							
Rent/LF							
Min Boat FT							
Max Boat FT							
Avg Boat FT							
# Vacancies							
Annual Building Lease (s) Income							
	Building Size SF		Annual Rent \$		Terms of Lease		
Restaurant (s)							
Retail Outlets (s)							
Office Space (s)							
Total Annual Expenses							
1.) Utilities							1
2.) Property Insurance							2
3.) Management Fees							3
4.) Maintenance and Repairs							4
5.) Salaries							5
6.) Advertising/Marketing							6
7.) Riparian Rights							7
8.) Supplies							8
9.) Reserves for Replacements (please explain)							9
Submitted By (please print):					Date:		
Telephone:			Email:				
Property Address:							