

# Income

## Status\*

Active  Under Contract  Withdrawn  Sold

## Listing Agent Information\*

Listing Agent ID\*: \_\_\_\_\_ Name\*: \_\_\_\_\_ Office Name\*: \_\_\_\_\_  
Email\*: \_\_\_\_\_ Office ID\*: \_\_\_\_\_  
Phone\*: \_\_\_\_\_ Office Phone\*: \_\_\_\_\_

## Co-Listing Agent Information

Co-Listing Agent ID: \_\_\_\_\_ Name: \_\_\_\_\_ Office Name: \_\_\_\_\_  
Email: \_\_\_\_\_ Office ID: \_\_\_\_\_  
Phone: \_\_\_\_\_ Office Phone: \_\_\_\_\_

## Showing Info

Showing Phone: \_\_\_\_\_ Showing Email: \_\_\_\_\_  
Showing Notes: \_\_\_\_\_

## Coop Compensation\*

Buyers Agency Compensation (\$ or %)\*: \_\_\_\_\_ Listing Contract Type\*:  
Transaction Broker Compensation (\$ or %)\*: \_\_\_\_\_  Exclusive Right  
 Exclusive Agency  
Variable Commission\*:  Yes  No Limited Service\*:  Yes  No  Other:  
Submitted Prospect?\*:  Yes  No \_\_\_\_\_

## General Info

### Address

County\*: \_\_\_\_\_ Tax ID\*: \_\_\_\_\_  
Street #\*: \_\_\_\_\_ Street Dir: \_\_\_\_\_  
Street Name\*: \_\_\_\_\_ Street Type: \_\_\_\_\_  
City\*: \_\_\_\_\_ ZIP Code\*: \_\_\_\_\_ Building #: \_\_\_\_\_

## Property Info

Legal Description\*: \_\_\_\_\_ Zoning\*: \_\_\_\_\_ Incorporated:  Yes  No  
Locale\*: \_\_\_\_\_ Property/Complex Name: \_\_\_\_\_

## Status & Listing Information

List Date\*: \_\_\_\_\_ Expiration Date\*: \_\_\_\_\_ Investor Blackout Ends: \_\_\_\_\_ No Showings Until: \_\_\_\_\_  
Price\*: \_\_\_\_\_ Price Type\*:  List Price  Auction **Auction Price:**  N/A  Lowest Bid  Reserve Price  
**Status Conditions\***:  Short Sale  Equitable Interest  Court  None Known  
**Seller Type\***:  Bank/GSE  Builder  Corp/Trust  Estate  Government  Individual  Relo Company  
**Sale Type\***:  Either  Investment  Owner/user

## Loan & Tax Information

Taxes\*: \_\_\_\_\_

Tax Year\*: \_\_\_\_\_

Senior Tax Exemption

### Financial Terms\*: (6)

- |                                          |                                               |
|------------------------------------------|-----------------------------------------------|
| <input type="checkbox"/> Cash            | <input type="checkbox"/> Other                |
| <input type="checkbox"/> Conventional    | <input type="checkbox"/> Owner Will Carry     |
| <input type="checkbox"/> Exchange        | <input type="checkbox"/> Private Financing    |
| <input type="checkbox"/> FHA             | <input type="checkbox"/> Qualified Assumption |
| <input type="checkbox"/> Jumbo           | <input type="checkbox"/> VA                   |
| <input type="checkbox"/> Lease Purchase) |                                               |

### Other Financial Terms:

\_\_\_\_\_  
\_\_\_\_\_

## Property Information (4)

- |                                          |                                            |                                           |                                          |
|------------------------------------------|--------------------------------------------|-------------------------------------------|------------------------------------------|
| <input type="checkbox"/> 1031 Exchange   | <input type="checkbox"/> Fix-Up            | <input type="checkbox"/> Income Potential | <input type="checkbox"/> Rent-to-Own     |
| <input type="checkbox"/> Agent Owner     | <input type="checkbox"/> Handicap Features | <input type="checkbox"/> Quick Possession | <input type="checkbox"/> Tenant Occupied |
| <input type="checkbox"/> Buyers Warranty | <input type="checkbox"/> HUD Owned         | <input type="checkbox"/> Quick Move-In    |                                          |

## Financials

### Annual Property

#### Operating Revenue:

Potential Rental Income Annual \$: \_\_\_\_\_

Less: Vacancy & Credit Losses Annual \$: \_\_\_\_\_

Effective Rental Income Annual \$: \_\_\_\_\_

Plus: Other Income/Collectable Annual \$: \_\_\_\_\_

Gross Operating Income Annual \$: \_\_\_\_\_

#### Operating Expenses:

Real Estate Taxes Annual \$: \_\_\_\_\_

Personal Property Tax Annual \$: \_\_\_\_\_

Property Insurance Annual \$: \_\_\_\_\_

Off Site Management Annual \$: \_\_\_\_\_

Payroll Annual \$: \_\_\_\_\_

Expenses/Benefit Annual \$: \_\_\_\_\_

Taxes/Workers Compensation Annual \$: \_\_\_\_\_

Repairs & Maintenance Annual \$: \_\_\_\_\_

HOA Fees Annual \$: \_\_\_\_\_

Accounting/Legal Annual \$: \_\_\_\_\_

Advertising/Permits Annual \$: \_\_\_\_\_

Other Services Annual \$: \_\_\_\_\_

#### Other Utilities:

Electricity Annual \$: \_\_\_\_\_

Gas Annual \$: \_\_\_\_\_

Water Annual \$: \_\_\_\_\_

TV Annual \$: \_\_\_\_\_

Internet Annual \$: \_\_\_\_\_

Phone Annual \$: \_\_\_\_\_

Other (please specify)

Enter other UtilityTypes:

\_\_\_\_\_

### Summary Income:

Actual Annual Income\*: \$ \_\_\_\_\_

Actual Annual Expense\*: \$ \_\_\_\_\_

Actual Annual Net Income: \$ \_\_\_\_\_

Projected Annual Income\*: \$ \_\_\_\_\_

Projected Annual Expense\*: \$ \_\_\_\_\_

Projected Annual Net Income: \$ \_\_\_\_\_

CAP Rate: % \_\_\_\_\_

CAP Rate Calculation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Utilities:

#### Owner Paid Utilities:

- Electricity
- Gas
- HOA Fees
- Internet
- Lawn Service
- Phone
- Trash
- TV
- Water
- Other
- None

#### Utility Metering:

- Common Electric Meter
- Separate Electric Meter
- Common Gas Meter
- Separate Gas Meter
- Common Water Meter
- Shared Water Meter
- Shared Boiler

#### Utility Billing to Tenants:

- Direct Billing from Utility
- Included in Rent
- Separate Bill from Owner

#### Tenant Paid Utilities:

- Electricity
- Gas
- HOA Fees
- Internet
- Lawn Service
- Phone
- Trash
- TV
- Water
- Other
- None

Other Utilites: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Site

Lot size SqFt\*: \_\_\_\_\_ Lot size Acres\*: \_\_\_\_\_ Frontage: \_\_\_\_\_ Depth: \_\_\_\_\_

## Site Description: (6)

- Adjacent to Greenbelt
- Adjacent to Open Space
- Adjacent to Park
- Corner Lot
- Cul-de-Sac
- Gated Community
- Golf Community
- Near Public Transit
- On Golf Course
- Waterfront

## Views:

- City View
- Golf Course View
- Mountain View
- River/Lake View

## Site Type:

- Agricultural
- Live/Work (Mixed Use)

## Primary Road: (1)

- Alley
- Dirt Road
- Easement
- Gravel Road
- Lease
- Paved Road

## Water/Mineral Rights:

- Irrigation Well Included
- Mineral Rights
- Water Rights

## Type & Distance to Public Transit:

Light Rail: \_\_\_\_\_

Bus: \_\_\_\_\_

Other: \_\_\_\_\_

## Public Transit Distance Type:

- Blocks
- Minutes
- Feet
- Steps
- Miles

## Exterior Features (12)

- Balcony
- Covered Deck
- Covered Patio
- Deck
- Dog Run
- Elevator Access
- Fence
- Front Porch
- Garden Area
- Gas Grill
- Gas Valve
- Hot Tub/Spa
- Patio
- Playground Area
- Pool, Private
- Pond/Lake
- Professional Landscaping
- Satellite Dish

- Solar
- Sprinkler System
- Tennis Court, Private
- Utility Shed
- Water Feature
- Wraparound Porch
- Yard

## Per Unit Features:

- Assigned Parking Per Unit
- Assigned Visitor Parking
- Garage Per Unit
- Individual Basement
- Storage Lockers Per Unit

## Features (12)

- Commercial Improvements
- Condo Docs
- Day Care
- Elevator - Freight
- Elevator - Passenger
- Environmental Audit Available
- Fire Alarm
- Fire Sprinkler
- Individual Basement
- Personal Property Tax
- Pool - Inside
- Pool - Outside
- Professionally Managed
- Residential Management
- Restaurant
- Storage Lockers
- Vending Machines

## Parking

### Parking Features: (7)

- 220 Volts
- Dry Walled
- Exterior Access Door
- Finished
- Floor Coating
- Heated
- Indoor RV Storage
- Insulated
- Lift
- Natural Light
- Oversized Deep
- Oversized Door
- Oversized Wide
- Pit
- Tandem

Available Amps: \_\_\_\_\_

## Parking & Vehicle Storage

Available Parking Types: Garage (Attached), Garage (Detached), Carport (Attached), Carport (Detached), Off-Street, Reserved, RV, None

Parking Type*:	# of Spaces*:	Length:	Width:	Features:
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

## Building

### Style:

- Ranch - 1 Story
- Multi-Story
- Multi-Level

### Architecture:

- A-Frame
- Bungalow
- Cabin
- Chalet
- Contemporary
- Denver Square
- Loft
- Mid-Century Modern
- Mountain Contemporary
- Other

- Spanish/Southwest
- Traditional
- Tudor
- Urban Contemporary
- Victorian

Year Built\*: \_\_\_\_\_

### Style

- ### Characteristics:
- Side-by-side
  - Up/down

### Building Type: (2)

- Duplex (all units)
- Triplex (all units)
- Quadplex (all units)
- 5+ Plex (all units)

- Low Rise (all units)
- High Rise (all units)
- Other

### Unit Access & Locations:

- Corridor Access
- Courtyard
- Exterior Access
- Garden Level

## Construction & Exterior\*

### Construction\*: (2)

- Block
- Brick
- Concrete
- Earth Berm
- Frame
- Log
- Manufactured
- Modular
- Straw Bale
- Other

### Exterior Materials\*: (2)

- Adobe
- Asbestos
- Brick
- Cedar Siding
- Cement Board
- Log
- Metal Siding
- Rock
- Stucco
- Vinyl Siding
- Wood Siding
- Other

### Roofing Materials\*: (2)

- Built-Up/Tar Gravel
- Cement Shake
- Composition
- Concrete Tile
- Metal
- Rolled Roofin
- Simulated Shake
- Slate
- Solar Shingles
- Spanish Tile
- Stone-Coated Steel
- Wood
- Other
- Unknown

## Green Features & Certification

### Year Certified

HERS Rating: \_\_\_\_\_ HERS Rating Score: \_\_\_\_\_ Home Energy Score<sup>N</sup>: \_\_\_\_\_

Energy Star Qualified New Home: \_\_\_\_\_

LEED for Homes: \_\_\_\_\_  Certified  Silver  Gold  Platinum

NAHB/ICC-700: \_\_\_\_\_  Bronze  Silver  Gold  Emerald

Other Certifications: \_\_\_\_\_

### Year Installed:

Solar PV: \_\_\_\_\_

Kilowatts: \_\_\_\_\_

Solar Thermal: \_\_\_\_\_

Solar Thermal Type: \_\_\_\_\_

Energy/Green Features Addendum Uploaded

## Interior Info

### Square Feet & Basement

SqFt Above\*: \_\_\_\_\_

SqFt Basement: \_\_\_\_\_

SqFt Total\*: \_\_\_\_\_

SqFt Finished\*: \_\_\_\_\_

### Measurement Source:

- Appraiser Measured
- Builder
- County Records
- Floor Plans
- Listor Measured

### Basement Size\*:

- Full
- Partial
- None

Basement Finished:  
 Yes  No

### Basement Type:

- Apartment
- Cellar
- Garden Level
- Walk-Out

Basement % Finished: \_\_\_\_\_

### Subfloor: (2)

- Crawl Space
- Slab
- Structural

## HVAC

### Fuel Type\*: (2)

- Electric
- Gas
- Heat Pump/Thermal
- Hot Water
- Oil
- Pellet
- Propane
- Solar
- Wood

### Heating Type\*: (2)

- Baseboard
- Forced Air
- Gravity
- Hot Water
- Radiant
- Solar Active
- Solar Passive
- Space Heater
- Steam
- Stove
- Wall Heater

### Cooling\*: (3)

- Air Conditioning - Central
- Air Conditioning - Individual
- Air Conditioning - Room
- Attic Fan
- Ceiling Fan
- Evaporative Cooler (Swamp)
- None
- Other

### Other HVAC: (3)

- Electronic Air Filter
- Humidifier
- Solar Water Heater
- Other (please specify)

## Fireplaces

### Fireplace Types:

- Electric
- Free-standing
- Gas/Gas Logs
- Insert
- Pellet
- Recirculator
- Wood

## Interior Features (15)

- Cable Available
- Double Pane Windows
- Eating Space/Kitchen
- Exercise Room
- Five Piece Bath
- Game Room
- Handicap Accessible
- Internet Access (Wired)
- Jack & Jill Bath
- Jet Action Tub
- Master Bath
- Master Suite
- Pet Free
- Remodeled
- Security Entrance
- Security System
- Skylights
- Smoke Free
- Storm Windows
- Triple Pane Windows
- Updated
- Vaulted Ceiling
- Walk-in Closets
- Wet Bar
- Window Coverings
- Work Shop (Interior)

## Appliances (10)

- |                                      |                                                 |                                                     |                                         |
|--------------------------------------|-------------------------------------------------|-----------------------------------------------------|-----------------------------------------|
| <input type="checkbox"/> Compactor   | <input type="checkbox"/> Microwave Oven         | <b>Laundry:</b>                                     | <b>Laundry Location:</b>                |
| <input type="checkbox"/> Cook Top    | <input type="checkbox"/> Refrigerator (Kitchen) | <input type="checkbox"/> Coin Operated              | <input type="radio"/> Basement          |
| <input type="checkbox"/> Dishwasher  | <input type="checkbox"/> Self-Cleaning Oven     | <input type="checkbox"/> Shared Laundry in Building | <input type="radio"/> Every Floor       |
| <input type="checkbox"/> Disposal    | <input type="checkbox"/> Smoke Alarm            | <input type="checkbox"/> W/D Hookups in Unit        | <input type="radio"/> External Facility |
| <input type="checkbox"/> Double Oven | <input type="checkbox"/> Stove/Range/Oven       | <input type="checkbox"/> W/D Included               | <input type="radio"/> Ground            |
| <input type="checkbox"/> Dryer       | <input type="checkbox"/> Sump Pump              | <input type="checkbox"/> None                       |                                         |
| <input type="checkbox"/> Freezer     | <input type="checkbox"/> Washer                 |                                                     |                                         |

## Flooring (4)

- |                                   |                                   |                                     |                                         |
|-----------------------------------|-----------------------------------|-------------------------------------|-----------------------------------------|
| <input type="checkbox"/> Carpet   | <input type="checkbox"/> Laminate | <input type="checkbox"/> Stone      | <input type="checkbox"/> Vinyl/Linoleum |
| <input type="checkbox"/> Concrete | <input type="checkbox"/> Parquet  | <input type="checkbox"/> Tile Floor | <input type="checkbox"/> Wood Floors    |

## Unit Info

# of Total Units: \_\_\_\_\_ # of Total Bedrooms: \_\_\_\_\_ # of Vacant Units: \_\_\_\_\_  
# of Total Baths: \_\_\_\_\_ # of Furnished Units: \_\_\_\_\_ # of Storage Units: \_\_\_\_\_

**Unit Types** (Entered per unit type): 1 Bedroom, 2 Bedroom, 3 Bedroom, 4+ Bedroom, Studio

	# of Baths:	# of Fireplaces:	# of Dishwashers:	# of Stoves:	# of Fridges:	# of AC:	# of Washers:	# of Dryers:	# of Hookups:	# of Storage:	Parking Spots:	Avg SqFt:	Avg Rent:
1 Bed	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
2 Bed	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
3 Bed	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
4+ Bed	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Studio	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____

## Community Info

### School Information\*

School District\*: \_\_\_\_\_ Middle: \_\_\_\_\_  
Elementary: \_\_\_\_\_ High: \_\_\_\_\_

### HOA/Management Company Information

**HOAs or Management Companies\*:**  Yes  No **Multiple HOAs or Management Companies?:**  Yes  No  
**HOA Type:** Professionally Managed, Self Managed, Voluntary **HOA Transfer Amount (\$ or %):** \_\_\_\_\_

**Fee Quoted\*:** Monthly, Quarterly, Semi Annually, Annual, Included in Property Tax, None

**HOA Transfer Based On<sup>N</sup>:**  % of Sale Price  % of Sellers Proceeds  Flat Fee  Other, See Remarks

**Master HOA/Management Company:** **2<sup>nd</sup> HOA:** **3<sup>rd</sup> HOA:**

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

Phone\*: \_\_\_\_\_

Website: \_\_\_\_\_

HOA Type: \_\_\_\_\_

Fee\*: \_\_\_\_\_

Fee Quoted\*: \_\_\_\_\_

### HOA Includes (10)

- |                                         |                                                            |                                    |                                        |
|-----------------------------------------|------------------------------------------------------------|------------------------------------|----------------------------------------|
| <input type="checkbox"/> Cable TV       | <input type="checkbox"/> Exterior Maintenance with Roof    | <input type="checkbox"/> Heat      | <input type="checkbox"/> Snow Removal  |
| <input type="checkbox"/> Clubhouse      | <input type="checkbox"/> Exterior Maintenance without Roof | <input type="checkbox"/> Insurance | <input type="checkbox"/> Tennis Courts |
| <input type="checkbox"/> Community Pool | <input type="checkbox"/> Fitness Facility                  | <input type="checkbox"/> Internet  | <input type="checkbox"/> Trash Removal |
| <input type="checkbox"/> Concierge      | <input type="checkbox"/> Grounds Maintenance               | <input type="checkbox"/> Recycling | <input type="checkbox"/> Water         |
|                                         |                                                            | <input type="checkbox"/> Sewer     |                                        |

## Restrictions & Covenants (5)

<input type="checkbox"/> Age Restricted Covenant	<input type="checkbox"/> First Right	<input type="checkbox"/> No Covenants	Other Restrictions:
<input type="checkbox"/> Appreciation Restrictions	<input type="checkbox"/> Income Restriction	<input type="checkbox"/> Ownership Retention	_____
<input type="checkbox"/> Deed Restrictions	<input type="checkbox"/> No Animals	<input type="checkbox"/> Pet Restrictions	_____

## Internet Display

Internet display of listing?  Yes  No                      Internet display of address?  Yes  No

For more information, please visit the Help tab in Matrix and click on Syndication.

Please select the syndication channel(s) for your listing: \_\_\_\_\_

Listing Syndication Date: \_\_\_\_\_

## Remarks

Public Remarks (1000 Characters):

Broker Remarks (1000 Characters):

Directions: \_\_\_\_\_

Exclusions\*: \_\_\_\_\_

Title Company: \_\_\_\_\_ Earnest Check To\*: \_\_\_\_\_

Possession: \_\_\_\_\_ Minimum Earnest Amount: \_\_\_\_\_

## Under Contract

Under Contract Date\*: \_\_\_\_\_ Accepting Backup Offers:  Yes  No

**Contingent Approval Conditions\*:**  Short Sell-Has unsigned offer(s) waiting for lender approval  
 Short Sell-Have signed                       Kick out - Contingent on home sale                       Offer accepted awaiting REO approval  
offer waiting for lender approval                       None Known                       Offer accepted contingent on court approval  
**Sold**                       Offer waiting on RELO company approval

Sold Price\*: \_\_\_\_\_ Sold Date\*: \_\_\_\_\_ Concession Amount: \_\_\_\_\_

**Sold Term\*:**  Cash     Conventional     FHA     Exchange     Lease Purchase     Other     Owner will carry  
 Qual Assumption     VA     Wrap Around

**Buyer Broker Paid By:**  Buyer     Listor/Seller     None     Other     Owner     Property Manager

**Concessions\*:**  Buyer Closing Costs/Seller Points Paid     Cash     None     Other  
 Personal Property     Seller Down Payment Assistance

Selling Agent ID\*: \_\_\_\_\_ Selling Company ID\*: \_\_\_\_\_

Co-selling Agent ID<sup>N</sup>: \_\_\_\_\_ Co-selling Company ID<sup>N</sup>: \_\_\_\_\_

Broker Closing Comments: \_\_\_\_\_