### Request for Information (RFI) Multi-Residential, Office & Retail Valuation Groups

Edmonton

For FULLY OR PARTIALLY TENANT OCCUPIED, please complete the following:

RFI-1 (Owner Contact and Certification)

RFI-2 (Building Area Form)

RFI-P (Parking Details)

RFI-C (Commercial Tenant Roll)

Most recent date available, April 2024 and future leases commencing on or before July 1.

RFI-I (Income Addendum)

Details of any tenant abatements, deferrals and collection loss

Annual Financial Statement

Most current available relating to the entire operations of the real property

For OWNER OCCUPIED, please complete the following:

RFI-1 (Owner Contact and Certification)

🗌 RFI-2 (Building Area Form)

RFI-3 (Yearly Expenses)

RFI-P (Parking Details)

For the multi residential portion of your building, Please complete the following:

#### RFI-1 (Owner Contact and Certification)

RFI-2 (Gross Building Area Form)

RFI-MP (Multi-Residential Parking Details)

RFI-M (Multi-Residential Tenant Roll)

Please identify any rental subsidies per unit, caretaker unit and all vacant units. Information can be provided either on our secure website, by filling out a form or in your own format: as of April, 2024.

RFI-MF (Multi-Residential Annual Financial Statement)

Most current available relating to the entire operations of the real property.

A. RFI-C (Commercial Tenant Roll) and RFI-I (Income Addendum) which includes the most current summary of the tenancy and vacancy of each building located on site. Information can be provided either on our secure website, by filling out a form or in your own format:

- Secure Website: assessmentrfi.edmonton.ca
  - Visit the assessmentrfi.edmonton.ca and login using the password in the letter sent by Assessment & Taxation
  - Forms: edmonton.ca/assessment, scroll down to the forms section and click on Request for Information. Either:
    - Choose the Request for Information forms for Office, Shopping Centre, Retail, or;

Choose the Tenant Roll Upload Template: Commercial, or;

• Choose the Income Addendum Template.

 Submit in your own format to assessment@edmonton.ca Please report:

- Any Rental Information Pertaining To Land Leases.
- Any Vacant Rentable Area That Your Building May Have Even If Only Partially Occupied
  - (E.G. 500 Sqft Of 600 Sqft Leased, 100 Sqft Is Vacant)

If submitting the Commercial Tenant roll in your own format, ensure it includes the following: Business Address, Business Name, Occupancy Type, Space Type, Tenant Space Finished, Floor, Gross Leased Area, Lease Negotiated/Start/Renewal/Expiry Dates, Net Rent, Rent Change Month/Rent, Operating Costs, Gross Rent, Other Rent/Description, Tenant Inducement Type/ Amount, Tenant/Landlord Improvements. For each tenant that pays additional rent (percent rent based on sales, etc.), record this amount in columns R (Other Rent) and S (Description of Other Rent). Identify Land Leases in a separate line on the tenant roll. **Excel format is preferred whenever possible.** 

If submitting Annual Financial Statements in your own format, please ensure it includes the following: 12 month fiscal period ending, Account, Building Address, Actual Reported Annual Income, Operating Cost Recovery, Actual Reported Expenses, Maintenance & Repairs, Administrative and Non-Recoverable Expenses. Most current available relating to the entire operations of the real property.

- B. RFI-M (Multi-Residential Tenant Roll) as of April, 2024. Please identify any rental subsidies per unit, caretaker unit and all vacant units. Information can be provided either on our secure website, by filling out a form or in your own format:
  - Secure Website: assessmentrfi.edmonton.ca
  - Visit the assessmentrfi.edmonton.ca and login using the password in the letter sent by Assessment & Taxation
  - Forms: edmonton.ca/assessment, scroll down to the forms section and click on Request for Information.
    - Either:

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- · Choose the Request for Information forms for Multi-Residential with Office or Retail, or;
- Choose the Tenant Roll Upload Template: Multi-Residential, or;
- Submit in your own format to assessment@edmonton.ca

If submitting the Multi-Residential Tenant roll in your own format, ensure it includes the following: Unit/Building address, Property Address, Occupancy Type, Vacancy Duration, Suite Type, Floor, Unit Size, Actual Rent, Market Rent, Furnished (Y/N), Low Income Affordable Housing (Y/N), Parking Included in Rent, Tenant Inducement Type, Tenant Inducement Amount. **Excel format is preferred whenever possible.** 

If submitting Annual Financial Statements in your own format, ensure it includes the following: Potential Gross Income, Vacancy & Collection Losses\*\*, Incentives, Fixed & Variable Operating Expenses, Utilities, Supplies, Repair & Maintenance, Replacements, Miscellaneous and Capital Expenditures/Major Maintenance & Repair. Most current available relating to the entire operations of the real property.

\*Vacancy Losses are an allowance for vacant space

\*\* Collection Losses are unpaid rents that the landlord is unlikely to recover

Pursuant to section 295 of the Municipal Government Act, R.S.A. 2000, c. M-26, the Assessment and Taxation Branch requires the requested information as it is necessary to prepare the assessment of this and other similar properties and to ensure that this property is not over assessed in relation to other similar properties.

Please note that under section 295(4) of the Municipal Government Act, failure to provide this requested information may result in the loss of the right to make a complaint about your assessment.

s. 295(4) No person may make a complaint in the year following the assessment year under section 460 or, in the case of designated industrial property, under section 492(1) about an assessment if the person has failed to provide any information requested under subsection (1) within 60 days from the date of the request.

This information is due on or before May 9, 2024.

## **Owner Contact and Certification**

Premise Address

RFI<sub>-</sub>1

Account:	Premise Address:
Section A: Contact	nformation
Name:	Position:
Company Name:	
Phone Number:	Fax Number:
E-Mail Address:	
Section B: Addition	al Information
Was there an appraisal	done on the property in the last 12 months ? $\Box$ Yes $\Box$ No if yes, complete the following:
Date of Apprais	al: Purpose of Appraisal: Amount
Which of the following b	est describes your property?
	occupied - A property is considered owner occupied if the property owner cupies the land and/or buildings
Partially own	<b>occupied</b> - A property is considered tenant occupied if the property has an arm's length lease er occupied and partially tenant occupied <b>ner occupied and partially tenant occupied</b>
	ave any tenants abandoned or breached leases in the subject property? $\Box$ Yes $\Box$ No on the RFI-I, Income Addendum.
	ave any leases been amended? Please provide details on RFI-I Income Yes No opies of any lease amending agreements.
Additional details or comments:	
Section C: Certificat	ion I hereby certify that the attached information is true and correct.

Signature

Date:

## **Building Area Form**

RFI-2

Please provide a breakdown of the gross, usable area within this building. Gross Building Area: Outside measurements of building. Gross Leasable Area: The total floor area designed for the occupancy and exclusive use of the tenants, including any basements and mezzanines.

Building Size (in square feet):	Gross Building Area	Gross Leasable Area	Building Size (in square feet):	Gross Building Area	Gross Leasable Area	Building Size (in square feet):	Gross Building Area	Gross Leasable Area
Basement			3 <sup>rd</sup> Floor			7 <sup>th</sup> Floor		
Main Floor			4 <sup>th</sup> Floor			8 <sup>th</sup> Floor		
Mezzanine			5 <sup>th</sup> Floor			9 <sup>th</sup> Floor		
2 <sup>nd</sup> Floor			6 <sup>th</sup> Floor			10 <sup>th</sup> Floor		

## **Gross Building Area Form**

Gross Leasable Area: The total floor area designed for the occupancy and exclusive use of the tenants, including any basements and mezzanines.

In Unit Laundry: refers to having a washer and dryer installed in the rental unit.

Affordable Housing: rental housing that requires a government grant to be built or operate. Rental units for low income affordable housing have rents or payments below typical market rent.

Gross Leasable Area:	In-suite laundry:	🗆 Yes 🛛 No
Total number of units: Number of units with balconies:	Number of units with a	ir conditionina:
Number of units subsidized by affordable housing:		

<u>C</u>	omme	rcial P	<u>arkin</u>	g Det	<u>ails</u>		RF	I-P
Commercial Parking Details	Total Number of Stalls	% Used for Hourly Parking	Monthly Rate	Hourly / Daily Rate	Number of Stalls Included in Lease	\$ per Stall Included in Leases	Number of Tandem Stalls *	\$ per Tandem Stall
Surface								
Covered								
Parkade Above Ground Heated								
Parkade Above Ground Non-Heated								
Underground								

## Multi-Residential Parking Details RFI-MP

Multi-Residential Parking Details	Number of Residential/ Tenant Stalls	Monthly \$ Per stall	Included in Rent (Y/N)
Uncovered/Surface			
Covered			
Garage/Underground			

### Guide To Completion Of Multi-Residential Tenant Roll

# The following overview of the fields located on the "Multi-Residential Tenant Roll" form is intended to assist you in the completion of the form:

PLEASE REPORT:

- Any Rental Information Pertaining To Land Leases.
- Any Vacant Rentable Area That Your Building May Have Even If Only Partially Occupied (E.G. 500 Sqft Of 600 Sqft Leased, 100 Sqft Is Vacant)

A	Unit Number	Unit number identifies the suite or unit of the business or living unit.
В	Property Address	The address where this space is located.
С	Occupancy Type	Owner, Tenant, Vacant, Caretaker
	Vacancy Duration	The number of months the unit has been vacant.
D	Suite Type	Type of suite being occupied (e.g. bachelor, 1bedroom, 1bedroom + den, 2bedroom, 2bedroom + den, 3bedroom, 4bedroom, Penthouse)
E	Floor	Physical location of the tenant's space within the building. (BSMT = Basement, MAIN, FLR02 = 2nd Floor, FLR03 = 3rd Floor, etc.)
F	Unit Size	The total gross area leased to the tenant.
G	Rent	<b>Actual Rent</b> is rent that is stated in the lease agreement. <b>Market Rent</b> is the opinion of rent that could be achieved at current market rates.
н	Check Box If Applicable For Each Unit	Check box if applicable for each unit that is furnished, Subsidized Rents/ Low Income Affordable Housing*, or has parking included in the rent. * <b>Subsidized Rents/Low income Affordable Housing:</b> Rental units that receive subsidy and/or are a part of a low income affordable housing program that require the units to collect a rent that is lower than the typical rent found in the market.
I	Tenant Inducement	Tenant inducements are incentives, such as free or discounted rent, cable, internet, or utilities that are provided by landlords either to attract new tenants or retain existing tenants. Amount (\$/month) and Duration (# of months)



## Multi-Residential Tenant Roll RFI-M for the month of April 2024

Whenever possible, please provide the rent roll in Excel format (.xls) by email to assessment@edmonton.ca and include all relevant information. You may also provide information in your own format.

Page of

Building of

Building Name:

Building Address:

Account #: Total Number of Units

#### ALL UNITS INCLUDING VACANT SPACE MUST BE LISTED ON THIS FORM AND INCLUDE POTENTIAL MONTHLY RENT

Α	В	С	D	E	F	(	G		Н		I				
							Rent (\$/mo Induce	onth before ements)	Check if applicable for each unit			Tenant Induc	Tenant Inducement		
Unit Number	Property Address	<b>Occupancy Type</b> (Owner, Tenant, Vacant, Caretaker)	Vacancy Duration (# of months.)	Suite Type (Bach, 1 Bdrm, 1Bd+Den, etc)	<b>Floor</b> (Bsmt, Main, 2nd, etc)	Unit Size (Sq ft)	Actual	Market	Furnished	Low Income Affordable Housing	Parking Included in Rent	<b>Type</b> (Free Rent, Free Cable, etc.)	Amount (\$/Month)	Duration (# of months	
101	EXAMPLE: 12345 Anywhere Street	Tenant		Bach	Main	740						Free Cable	40		
													+		
													<u> </u>		
													<u> </u>		
													<sup> </sup>		

Initial

Date:

## **Multi-Residential Annual Financial Statement**

|--|

	12 Month Fisca	al Period Ending _					
Account:	Buildir	ng Address:					
Potential Gross Income			Supplies				
Potential Gross Rent			Caretaker or Janitorial				
100% Occupancy (Unfurnished) Potential Gross Rent		_	Office				
100% Occupancy (Furnished)		_	Repair & Maintenance				
Miscellaneous Income			*Do Not include Capital Expenditures				
Parking Revenue			Repairs of Structure - Interior				
Laundry Rental		_	Repairs of Structure - Exterior				
Other (pet fees, storage fees, late fees, etc.):		-	Elevator Lawn Maintenance & Snow				
Total Income		_	Removal				
		_	Specify Other				
Vacancy and Collection Los	<u>S</u>		· · · · ·				
Apartment Vacancy in Dollars		_	Replacements				
# of units vacant in reporting period			* <u>Do Not</u> include Capital Expenditures				
Apartment Collection Loss		_	Appliances				
Apartment Incentives		-	Laundry Equip Flooring				
Attach additional documents if	necessary	_	Interior Painting				
On and the England Final			Other				
Operating Expenses Fixed			Specify Other				
Property Taxes		_					
Insurance Business License		_	<u>Miscellaneous</u> Other				
Other		_	Specify Other				
Specify Other		_	Advertising				
Operating Expenses Variabl	<u>e</u>		<u>Capital Expenditures / Major</u>				
Management			Maintenance / Repair *				
Professional Fees		_	Description				
Administrative		_					
Telephone / Internet		_					
<b>Caretaker</b> Salary			Roof     Bathroom     Exterior Finish     Flooring				
Rental Discount		-	☐ (windows, doors, exterior siding/walls)				
		_	Mechanical Flooring				
<u>Utilities</u>			☐ (electrical, plumbing Common Area and HVAC) ☐ (Walls/Doors/				
Water & Sewer	Incl. in Rent?	🗌 Yes 🔲 No	and HVAC) (Walls/Doors/				
Waste Removal	-		* Capital Expenditures are those expenses that do				
Power	_ Incl. in Rent?		not occur annually, involving replacement of worn out				
Gas Cable	_ Incl. in Rent?	Yes No	or obsolete components where replacement is of significant duration and cost.				
	-						

Initial:

Date:

## Guide To Completion Of Commercial Tenant Roll

# The following overview of the fields located on the "Commercial Tenant Roll" RFI-C form is intended to assist you in the completion of the form:

PLEASE REPORT:

- Any Rental Information Pertaining To Land Leases.
- Any Vacant Rentable Area That Your Building May Have Even If Only Partially Occupied
- (E.G. 500 Sqft Of 600 Sqft Leased, 100 Sqft Is Vacant)

А	Business Address	Unit number identifies the suite or unit of the business. Street address identifies the premises address of the business or building.
В	Business Name	Business name and the legal entity leasing/occupying the space.
С	Occupancy Type	Owner, Tenant, Vacant
D	Space Type	Office, commercial retail unit, convenience store, bank, restaurant, fast food, auto service, drug store, grocery store, anchor, storage, warehouse, theatre
E	Floor	Physical location of the tenant's space within the building. (BSMT = Basement, MAIN, MZ = Mezzanine, 2 = 2nd floor etc.)
F	Gross Leased Area	The total floor area designed for the occupancy and exclusive use of the tenants, including any basements and mezzanines.
G	Tenant Space Finished	<b>Improved</b> space includes interior finishing items (ceiling finish, drywall, floor covering, heating, ventilation ductwork, electrical systems and other finishes). <b>Raw</b> space has no interior finishing.
Н	Lease Negotiated Date	The date the lease was signed and agreed upon.
I	Lease Start Date	Date the lease agreement takes effect or the vacancy occurred. (MMM/YYYY) Mark Month to Month (MTM) if no lease term exists.
J	Lease Renewal Date	Date of most recent lease renewal. (MMM/YYYY) Mark Month to Month (M to M) if no lease exists.
К	Expiry Date	Date that the lease agreement expires (MMM/YYYY).
L	New or Renewal or Step Up/Step Down ( N/R/S)	<ul> <li>New is a new lease agreement of a tenant occupying a space that was vacant or occupied by a previous tenant, may include tenant expansion Renewal is when a new lease agreement occurs with an existing tenant, where the rents and terms are negotiated based on market conditions at the time of renewal.</li> <li>Step Up/Step Down is a scheduled change to the rental rate within th term of the existing lease or exercised renewal options with predetermined rent and lease terms.</li> </ul>
М	Net Rent	Rent that is stated in the lease agreement excluding operating or additional costs (\$/Month), Do NOT include GST.
Ν	Rent Change Month	Date when rent change (step up/step down) commences.
0	Rent Change	Amount of the change in rent (step up/step down).
Р	Operating Costs	Typical building expenses that are charged back to the tenant (such a utilities, property taxes, etc). Do NOT Include GST.
Q	Gross Rent	Rent that is stated in the lease agreement including operating or additional costs (\$/Month).
R	Other Rent	Any additional rent charged for percent rent, signage, etc (\$/Month).
S	Description Of Other Rent	Description of what other rent is. I.E Signage
Т	Tenant Inducement Type	Description of what the tenant inducement is. i.e. free rent, cash payment etc.
U	Inducement Amount	The total dollar amount of any inducements paid to the tenant for this space.
V	Tenant Improvements	A negotiated sum a tenant is willing to spend to customize space for their needs (Only include items within the lease term, don't include chattels).
W	Landlord Improvements	A negotiated sum a landlord is willing to spend to customize space for the needs of a particular tenant, within the lease term.

#### Edmonton

### **Commercial Tenant Roll RFI-C**

Whenever possible, please provide the rent roll in Excel format (.xls) by email to assessment@edmonton.ca and include all relevant dates including step-up and renewal dates.

Page of

Building Name: \_\_\_\_\_

Building Address:

Account:

Building of

AL	ALL UNITS INCLUDING VACANT MUST BE LISTED ON THIS FORM AND INCLUDED IN THE TOTAL. DO NOT INCLUDE G.S.T																						
				Space	Desci	ription			Lease Dates				Annual Lease Details						Tena Induce			nant vements	
	Α	В	С	D	E	F	G	н	I	J	к	L	М	N	0	Р	Q	R	S	Т	U	V	W
	Business Address(es) Init # Street Address	Business Name(s) and Legal Entity	Occupancy Type (Owner, Tenant, Vacant)	Space Type (Office, Retail, WHSE, Land Lease, Storage)	<b>Floor</b> (Bsmt, Main, Mezz, 2nd flr, etc)	Gross Leased Area (Square Feet)	<b>Tenant Space Finished</b> Raw (RAW) / Improved (IMP)	LeaseNegotiated Date (MMM/YYYY)	Lease Start Date (MMM/YYYY)	Lease Renewal Date (MMM/YYYY)	Expiry Date (MMM/YYYY)	New, Renewal or Step Up/ Step Down (N/R/S)	Net Rent(\$/Month)	Rent Change (Step Up/ Step Down) Month / Year (MMM/YYYY) (Next Scheduled Rental Increase in lease agreement)	Rent Change (Step Up/ Step Down) (\$/Month)	Operating Costs (e.g. Util, Taxes, Etc.) (\$/Month)	<b>Gross Rent</b> ( = Net Rent + Other Rents + Operating Cost) (\$/Month)	Other Rent (\$/Month)	Description of Other Rent (e.g. Sign, %Rent, Etc)	Tenant Inducement Type (ie. Free Rent, Cash Payment etc.)	Inducement Amount (\$/sq.ft or Total \$ amount	Tenant Improvements (\$/sq.ft or Total \$ amount	Landlord Improvements (\$/sq.ft or Total \$ amount
101	EXAMPLE: 12345 Anywhere Street	Business XYZ Ltd.	Tenant	Office	м	2000	IMP	Jan/2010	Jan/2011	Jan/2017	Dec/2021	R	3500	Aug/2019	3750	2500	6000	25	Sign	Free Rent	4500 or 2.25 \$/sqft	6500 or 3.25 \$/sqft	4200
102	EXAMPLE: 12345 Anywhere Street	Vacant	Vacant	CRU	м	3000	IMP									3500							

Total Leasable Area (sq. ft)

(including all leased and vacant space)

pace)

Initial

Date:

### Guide To Completion Of RFI-I (Income Addendum)

The following overview of the fields located on the "Income Addendum" RFI-I form is intended to assist you in the completion of the form.

This includes detailed information on tenant abatements, deferrals, and collection loss.

UNIT NUMBER	Unit number identifies the suite or unit of the business.
BUSINESS ADDRESS	Street address identifies the premises address of the business or building.
BUSINESS NAME/ LEGAL ENTITY	Business Name and the Legal Entity leasing / occupying the space
BASE RENT	
Year	July 2023 to June 2024
Due/Amount per lease agreement (\$)	Rent that is currently being paid as stated in the lease agreement, excluding operating or additional costs (\$/Month). Do NOT include GST
Collected from Tenant (\$)	Monies received directly from Tenant
ABATEMENT* (\$)	*Abatement: Reduction in the rental amount that is not to be paid back.
DEFERRAL** (\$)	**Deferral: Unpaid contractual rent that is agreed to be paid at a future date.
OPERATING COSTS	
Year	July 2023 to June 2024
Due/Amount per lease agreement (\$)	Rent that is currently being paid as stated in the lease agreement, excluding operating or additional costs (\$/Month). Do NOT include GST.
Collected from Tenant (\$)	Monies received directly from Tenant
ABATEMENT* (\$)	*Abatement: Reduction in the rental amount that is not to be paid back.
DEFERRAL** (\$)	**Deferral: Unpaid contractual rent that is agreed to be paid at a future date.

### **RFI-I Income Addendum**

Edmonton Request for Information for Office, Shopping Centres, Retail, Parkade and Industrial Valuation Groups Assessment and Taxation

P.O. Box 1935, Station Main Edmonton, AB T5J 2P3

Phone: 780-442-1495 Fax: 780-196-1986 email: assessment@edmonton.ca

edmonton.ca/assessment

Account:

Property Address:

ONLY PROVIDE DETAILS ON SPACES AFFECTED BY ABATEMENT AND/OR DEFERRAL.

			BASE RENT			UNCOLLECTED BASE RENT		OPERATING COSTS			UNCOLLECTED OPERATING COSTS	
Unit Number	Business Address	Business Name(s) & Legal Entity	Year	Due/Amount per lease agreement (\$)		Abatement* (\$)	Deferral* (\$)	Year	Due/Amount per lease agreement (\$)	Collected from Tenant (\$)	Abatement* (\$)	Deferral* (\$)
			Jul-23					Jul-23				
			Aug-23					Aug-23				
			Sep-23					Sep-23				
			Oct-23					Oct-23				
			Nov-23					Nov-23				
			Dec-23					Dec-23				
			Jan-24					Jan-24				
			Feb-24					Feb-24				
			Mar-24					Mar-24				
			Apr-24					Apr-24				
			May-24					May-24				
			Jun-24					Jun-24				

\*Abatement: Reduction in the rental amount that is not to be paid back \*\*Deferral: Unpaid contractual rent that is agreed to be paid at a future date.

\_\_\_\_\_

			BASE RENT			UNCOLLECTED BASE RENT		OPERATING COSTS			UNCOLLECTED OPERATING COSTS	
Unit Number	Business Address	Business Name(s) & Legal Entity	Year	Due/Amount per lease agreement (\$)		Abatement* (\$)	Deferral* (\$)	Year	Due/Amount per lease agreement (\$)	Collected from Tenant (\$)	Abatement* (\$)	Deferral* (\$)
			Jul-23					Jul-23				
			Aug-23					Aug-23				
			Sep-23					Sep-23				
			Oct-23					Oct-23				
			Nov-23					Nov-23				
			Dec-23					Dec-23				
			Jan-24					Jan-24				
			Feb-24					Feb-24				
			Mar-24					Mar-24				
			Apr-24					Apr-24				
			May-24					May-24				
			Jun-24					Jun-24				

			BASE RENT			UNCOLLECTED BASE RENT			OPERATING COST	UNCOLLECTED OPERATING COSTS		
Unit Number	Business Address	Business Name(s) & Legal Entity	Year	Due/Amount per lease agreement (\$)		Abatement* (\$)	Deferral* (\$)	Year	Due/Amount per lease agreement (\$)	Collected from Tenant (\$)	Abatement* (\$)	Deferral* (\$)
			Jul-23					Jul-23				
			Aug-23					Aug-23				
			Sep-23					Sep-23				
			Oct-23					Oct-23				
			Nov-23					Nov-23				
			Dec-23					Dec-23				
			Jan-24					Jan-24				
			Feb-24					Feb-24				
			Mar-24					Mar-24				
			Apr-24					Apr-24				
			May-24					May-24				
			Jun-24					Jun-24				