



PROPERTY EXPENSE PROFILE

Prepared by: Agent \_\_\_\_\_
Broker \_\_\_\_\_

Phone \_\_\_\_\_
Email \_\_\_\_\_

NOTE: This form is used by an owner and their sales or leasing agent when preparing a marketing package for the sale of a one-to-four unit residential property or the lease of any type property and disclosing the property's operating costs, to prepare a worksheet to be handed to prospective buyers and tenants for their review of the monthly property operating costs and deposits they will likely incur on taking possession of the property.

DATE: \_\_\_\_\_, 20\_\_\_\_\_, at \_\_\_\_\_, California.

1. PROPERTY TYPE \_\_\_\_\_

- 1.1 Location \_\_\_\_\_
1.2 Expense figures are estimates reflecting:
a. [ ] current expenses of occupancy/ownership.
b. [ ] forecast of anticipated expenses of occupancy.

2. MONTHLY OPERATING EXPENSES:

Table with 21 rows listing monthly operating expenses such as Electricity, Gas, Water, TV, Phone, Internet, Trash, Sewage, General obligation bonds, Lawn/Gardening, Maid/Housekeeping, Pool/Spa, Homeowners' Association (HOA), Maintenance and repair, Property management services, Insurance, Taxes, Other, Total Operating Expenses, Monthly Loan Payment (Principal and Interest), and Total Monthly Expenses.

3. DEPOSITS:

Table with 8 rows listing deposits such as Rental security deposit, Electricity deposit, Water deposit, Sewage and rubbish deposit, Gas service deposit, Phone service deposit, Other, and Total Deposits.

OWNER: I have read and approve this information.

Date: \_\_\_\_\_, 20\_\_\_\_
Owner's Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Date Prepared: \_\_\_\_\_, 20\_\_\_\_
Broker: \_\_\_\_\_
CalBRE #: \_\_\_\_\_
Agent: \_\_\_\_\_
CalBRE #: \_\_\_\_\_
Phone: \_\_\_\_\_ Cell: \_\_\_\_\_
Fax: \_\_\_\_\_
Email: \_\_\_\_\_

PROSPECTIVE BUYER:
I have received and read a copy of this estimate.
Date: \_\_\_\_\_, 20\_\_\_\_
Name: \_\_\_\_\_
Signature: \_\_\_\_\_