



# AGENT SURVEY SHEET FOR NONRESIDENTIAL PROPERTY

Tenant or Buyer-Occupant

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

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

**NOTE:** The purpose of this form is to gather information about a commercial property, the rent or price, the condition of the property and the nature of the surrounding area, to determine its suitability for a Tenant or Buyer-Occupant of the property.

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

*Items left blank or unchecked are not applicable.*

## 1. PROPERTY FACTS:

- 1.1 Address: \_\_\_\_\_
- 1.2 Total interior usable square footage: \_\_\_\_\_
- 1.3 Lot size: \_\_\_\_\_
- 1.4 Year built: \_\_\_\_\_
- 1.5 Construction type: \_\_\_\_\_  
\_\_\_\_\_
- 1.6 Building zoning/uses: \_\_\_\_\_
- 1.7 Roof/support construction type: \_\_\_\_\_
- 1.8 Number of parking spaces: \_\_\_\_\_

## 2. OFFICE/IMPROVED SPACE:

- 2.1 Interior usable square footage of existing office/improved space: \_\_\_\_\_.
- 2.2 Number of bathrooms: \_\_\_\_\_.
- 2.3 Describe kitchen facilities: \_\_\_\_\_
- 2.4 Describe breakroom/staff lounge facilities: \_\_\_\_\_
- 2.5 Sprinkler system in the office/improved space:  Yes;  No.

## 3. WAREHOUSE SPACE:

- 3.1 Interior usable square footage of open warehouse: \_\_\_\_\_.
- 3.2 Ceiling clearance height in warehouse: \_\_\_\_\_.
- 3.3 Type of flooring in the warehouse: \_\_\_\_\_
- 3.4 Description of loading dock(s): \_\_\_\_\_
- 3.5 Description of truck well(s): \_\_\_\_\_
- 3.6 Description of ground level door(s) for warehouse: \_\_\_\_\_
- 3.7 Suitability for distribution shipping and receiving: \_\_\_\_\_
- 3.8 Describe any railroad spur to the property: \_\_\_\_\_
- 3.9 Sprinkler system in the warehouse:
  - a. Type of fire suppression and fire detection system: \_\_\_\_\_
  - b. System design density: \_\_\_\_\_
  - c. Remote area of operation: \_\_\_\_\_
  - d. Number of sprinklers operating in the remote test area: \_\_\_\_\_.
  - e. Sprinkler spacing (between line dimension and between sprinkler heads on the line dimension): \_\_\_\_\_  
\_\_\_\_\_
  - f. K-factor/type of sprinklers: \_\_\_\_\_
  - g. Sprinkler head temperature rating (F°): \_\_\_\_\_.
- 3.10 Gas main:  Yes;  No. \_\_\_\_\_
- 3.11 Electric service panel capacity (amps): \_\_\_\_\_
- 3.12 Type of lighting in the warehouse: \_\_\_\_\_

**4. INITIAL TERM OF LEASE:**

- 4.1 Monthly asking rent: \$ \_\_\_\_\_.
- 4.2 If the asking rent is a teaser rate, base rent sought: \$ \_\_\_\_\_.
- 4.3 Describe any tenant move-in incentives Owner is offering: \_\_\_\_\_  
\_\_\_\_\_
- 4.4 Planned incremental rent increases: \_\_\_\_\_.  
  - a. Period for adjustment: \_\_\_\_\_.
  - b. Amount of adjustment: \_\_\_\_\_.
- 4.5 Term of lease: \_\_\_\_\_.
- 4.6 Security deposit: \$ \_\_\_\_\_.
- 4.7 Required upfront prepaid rent: \$ \_\_\_\_\_.
- 4.8 Option to extend lease:  Yes,  No. Terms: \_\_\_\_\_
- 4.9 Option to buy property:  Yes,  No.
- 4.10 Right of first refusal:  Yes,  No.
- 4.11 Maintenance costs paid by Owner:
 

<input type="checkbox"/> Plumbing and sewers	<input type="checkbox"/> Heating and air conditioning	<input type="checkbox"/> Lawns and shrubbery
<input type="checkbox"/> Structural foundations	<input type="checkbox"/> Store front	<input type="checkbox"/> Sidewalks
<input type="checkbox"/> Exterior walls	<input type="checkbox"/> Plate glass	<input type="checkbox"/> Driveways/right of ways
<input type="checkbox"/> Roof	<input type="checkbox"/> Parking areas	<input type="checkbox"/> Electrical
<input type="checkbox"/>		
- 4.12 Utility expenses paid by Landlord: \_\_\_\_\_
- 4.13 Property taxes, property insurance premiums and like items are paid by the  Owner,  Tenant.  
Insurance coverage to be provided by Tenant: \_\_\_\_\_
- 4.14 Monthly common area maintenance (CAM) charges for this space: \_\_\_\_\_.
- 4.15 TIs are paid by the  Owner,  Tenant.
  - a. TIs are included in the rent:  Yes,  No. Terms: \_\_\_\_\_
  - b. Tenant is required to remove the TIs when vacating:  Yes;  No. Terms: \_\_\_\_\_
- 4.16 Repairs for vandalism or earthquake damage are paid by the  Owner,  Tenant.
- 4.17 Date Tenant may take possession of the property: \_\_\_\_\_, 20\_\_\_\_\_.

**5. SALES TERMS:**

- 5.1 Property offered for sale:  Yes,  No.
- 5.2 Listing price: \$ \_\_\_\_\_. Was price reduced?  Yes,  No. When \_\_\_\_\_, 20\_\_\_\_\_.
- 5.3 Sale price expected: \$ \_\_\_\_\_. Fair market value (FMV) \$ \_\_\_\_\_.
- 5.4 Price Owner paid for property: \$ \_\_\_\_\_.
- 5.5 The listing price was set based on: \_\_\_\_\_
- 5.6 Minimum down payment expected: \$ \_\_\_\_\_.
- 5.7 Existing financing:
  - a. Financing encumbering property \$ \_\_\_\_\_. Interest rate \_\_\_\_\_%.
  - b. Date financing recorded: \_\_\_\_\_, 20\_\_\_\_\_.
  - c. The loan is assumable:  Yes,  No. Charges: \$ \_\_\_\_\_.
  - d. Owner will carryback a note and trust deed:  Yes,  No. Terms \_\_\_\_\_
  - e. Mello-Roos bonds on the property:  Yes,  No. Annual payment: \$ \_\_\_\_\_.  
Principal balance \$ \_\_\_\_\_.
- 5.8 New financing:
  - a. Owner requires Buyer to be preapproved:  Yes,  No. Documentation required \_\_\_\_\_
  - b. Owner will pay \_\_\_\_\_%, or  \$ \_\_\_\_\_, of Buyer's closing costs (recurring/nonrecurring).

c. Other price concessions Owner will agree to for replacement of components (cashback/credit for painting, flooring, obsolescence, etc.): \_\_\_\_\_

**6. LOCATION/NEIGHBORHOOD:**

6.1 Describe the surrounding area: \_\_\_\_\_

6.2 Volume of foot traffic and street traffic this location receives: \_\_\_\_\_

6.3 Distance to freeway access: \_\_\_\_\_

6.4 Closest bus route/stop: \_\_\_\_\_

6.5 Distance to post office: \_\_\_\_\_

6.6 Distance to nearest bank: \_\_\_\_\_ Name of Bank: \_\_\_\_\_

6.7 Distance to a police station: \_\_\_\_\_

6.8 Distance to a fire station: \_\_\_\_\_

6.9 Distance to area amenities, such as restaurants and shopping: \_\_\_\_\_

6.10 Local food truck service is available:  Yes,  No.

6.11 Distance to regional airport: \_\_\_\_\_

6.12 Problems with vandalism or crime reported in the area: \_\_\_\_\_

6.13 Known prior earthquake damage in the area, earthquake faults or seismic hazards: \_\_\_\_\_

6.14 Problems with noise nuisance in the area: \_\_\_\_\_

**7. PROPERTY INVESTIGATION:**

7.1 Available printed information on the property Owner's agent can provide:

- Property profile
- Title profile
- Promotional flier
- Zoning map
- MLS printout of property
- Floor plans
- Nonresidential Building Energy Use Disclosure consisting of a Statement of Energy Performance, Data Checklist and Facility Summary
- \_\_\_\_\_

7.2 Title information (vesting and entity status, grant deed, trust deed amount/due-on clause, property taxes paid, CC&Rs/use restrictions): \_\_\_\_\_

7.3 Will the mortgage lender subordinate to Tenant's lease:  Yes,  No. \_\_\_\_\_

7.4 Reason for Owner leasing or selling the property: \_\_\_\_\_

7.5 Prior offers to rent:  Yes,  No.

7.6 Prior offers to buy:  Yes,  No.

7.7 Subleasing allowed:  Yes,  No.

7.8 Personal property included: \_\_\_\_\_

[See ft Form 256]

7.9 Property is in compliance with city ordinances:  Yes,  No.

7.10 Certifications/retrofitting required: \_\_\_\_\_

7.11 Describe the existing internet connections and phone lines: \_\_\_\_\_

7.12 Existing energy efficiency improvements: \_\_\_\_\_

7.13 ENERGY STAR® Energy Performance Score: \_\_\_\_\_

7.14 Limitations for placing a sign/logo on the property: \_\_\_\_\_

7.15 Landscaping can be modified:  Yes,  No. \_\_\_\_\_

- 7.16 Other properties owned by Owner: \_\_\_\_\_
- 7.17 Owner's age:\_\_\_\_\_. Residence address: \_\_\_\_\_
- 7.18 Type of business operations of other tenants, if any, in the building: \_\_\_\_\_
- 7.19 Length of time other tenants have occupied the property: \_\_\_\_\_
- 7.20 Contact information of other tenants: \_\_\_\_\_
- 7.21 Property has been well maintained:  Yes,  No. \_\_\_\_\_
- 7.22 Describe the extent of improvement obsolescence: \_\_\_\_\_
- 7.23 Security measures installed at property: \_\_\_\_\_
- 7.24 Describe the local vacant property absorption rate: \_\_\_\_\_
- 7.25 Describe this property's unique benefits: \_\_\_\_\_

**8. OPERATING EXPENSES:**

- 8.1 Property taxes: . . . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.2 Office Expenses/Supplies: \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.3 Advertising: . . . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.4 Electricity: . . . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.5 Gas: . . . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.6 Water/Sewer: . . . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.7 Trash: . . . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.8 Insurance: . . . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.9 Management Fee: . . . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.10 Lawn/Gardening: . . . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.11 Janitorial: . . . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.12 Maintenance: . . . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.13 Repairs and Replacements: \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.14 Cable/Phone: . . . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.15 Accounting/Legal Fees: . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.16 Security system: . . . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.17 HVAC maintenance: . . . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.18 Roof maintenance: . . . . . \$ \_\_\_\_\_ . Service provider: \_\_\_\_\_
- 8.19 **TOTAL** . . . . . \$ \_\_\_\_\_ .

**9. OWNER'S AGENT'S INFORMATION:**

- 9.1 Agent's Name: \_\_\_\_\_ BRE #: \_\_\_\_\_
- 9.2 Firm/Broker's Name: \_\_\_\_\_ BRE #: \_\_\_\_\_
- 9.3 Agent's Phone: \_\_\_\_\_ Agent's Email: \_\_\_\_\_

Date: \_\_\_\_\_, 20\_\_\_\_\_

By: \_\_\_\_\_