

Request for Information (RFI)

Multi-Residential, Office & Retail Valuation Groups

Please complete the following:

RFI-1 (Owner Contact and Certification)

RFI-2 (Building Area Form)

RFI-P (Commercial Parking Details)

RFI-MP (Multi-Residential Parking Details)

RFI-C (Commercial Tenant Roll)

Most recent date available, June 2021 if possible.

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, 2021.

A. RFI-C (Commercial Tenant Roll) most recent date available, June 2021 if possible, a 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 Multi-Residential with Office or Retail, or;
- Choose the Tenant Roll Upload Template: Commercial, or;
- Submit in your own format to assessment@edmonton.ca

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 Escalation 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 (for fiscal year ending May 31, 2021 if available) relating to the entire operations of the real property.

B. RFI-M (Multi-Residential Tenant Roll) as of April, 2021. 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:

- 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, Suite Type, Floor, Unit Size, Actual Rent, Market Rent, Furnished (Y/N), Low Income Affordable Housing (Y/N), Deck/Balcony (Y/N), Tenant Inducement Type, Tenant Inducement Amount, In-Suite Laundry, Assistance Provided as a Result of COVID-19.

If submitting Annual Financial Statements in your own format, ensure it includes the following: Potential Gross Income, Vacancy & Collection Losses, Fixed & Variable Operating Expenses, Utilities, Supplies, Repair & Maintenance, Replacements, Ground & Parking Area Maintenance, Miscellaneous and Capital Expenditures/Major Maintenance & Repair. Most current available (for fiscal year ending May 31, 2021 if available) relating to the entire operations of the real property.

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 **July 2, 2021**.

Owner Contact and Certification

RFI-1

Account #: _____ Building Address: _____

Operating Business Name: _____ Legal Entity: _____

Was there an appraisal done on the property in the last 12 months ? Yes No if yes, complete the following:

Date of Appraisal: _____ Purpose of Appraisal: _____ Amount _____

Section A: Company Representative

Name: _____ Position: _____

Company Name: _____

Phone Number: _____ Fax Number: _____

E-Mail Address: _____

Section B: Alternate Contact Person (if different from above)

Name: _____ Position: _____

Phone Number: _____ Fax Number: _____

E-Mail Address: _____

Section C: Certification I hereby certify that the attached information is true and correct.

Signature _____ Date: _____

Building Area Form

RFI-2

The City of Edmonton is requesting a breakdown of Gross and Usable area within this building. If there were any renovations, changes in size, modifications, or upgrades to the property between January 1 and **December 31, 2020** please complete the following table. If there has been **NO** change to the properties, please simply advise us that there have been no changes. Gross Building Area: Outside measurements of building. Leasable Area: The total floor area designed for the occupancy and exclusive use of the tenants, including any basements and mezzanines.

No Change

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

Commercial Parking Details

RFI-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	Number of Public Stalls	Monthly \$ per stall	Number of Tandem Stalls *	Monthly \$ per stall	Included in Rent (Y/N)
Surface							
Covered							
Parkade - Not Heated							
Parkade - Heated							

* Tandem stall refers to parking that can be occupied by two vehicles at the same time.

You can submit documents via mail to P.O. Box 1935, Station Main, Edmonton, AB T5J 2P3, fax to (780) 496-1986, or e-mail (.pdf, .xls) to assessment@edmonton.ca

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.
B	Property Address	The address where this space is located.
C	Occupancy Type	Owner, Tenant, 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 (B = Basement, M = Main, MZ = Mezzanine, 2 = 2 nd Floor, etc.)
F	Unit Size	The total area leased to the tenant.
G	Rent	Actual Rent is rent that is stated in the lease agreement. Market Rent is the opinion of rent that could be achieved at current market rates.
H	Check Box If Applicable For Each Unit	Check box if applicable for each unit that is furnished, or has Government subsidized rent, or if it has a deck or a balcony.
I	Tenant Inducement	Description of what the tenant inducement is (i.e. free rent, cash payment, etc.) and the total dollar amount of any inducements paid to the tenant for this space.
J	Assistance Provided as a Result of Covid	Type (i.e., Rent Reduction, Rent Deferral, Government Funds/Grants, etc.) and Amount (\$ per month)



Multi-Residential Tenant Roll RFI-M for the month of April 2021

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.

Building Name: _____ Building Address: _____ Account #: _____ Building ____ of ____

Total Number of Units _____

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

A Unit Number	B Property Address	C Occupancy Type (Owner, Tenant, Vacant, Caretaker)	D Suite Type (Bach, 1 Bdrm, 1Bd+Den, etc)	E Floor (Bsm, Main, 2nd, etc)	F Unit Size (Sq ft)	G Rent (\$/Month before Inducements)		H Check Box if applicable for each unit				I Tenant Inducement		J Assistance Provided as a Result of Covid	
						Actual	Market	Furnished	Low Income Affordable Housing	Deck / Balcony	In-Suite Laundry	Type (Free Rent, Free Cable, etc)	Amount (\$/Month)	Type (i.e., Rent Reduction, Rent Deferral, Government Funds/Grants, etc.)	Amount (\$/Month)
101	EXAMPLE: 12345 Anywhere Street	Tenant	Bach	Main	740	800	750					Free Cable	40		

Initial _____ Date: _____

Information is being collected under the authority of section 295 of the Municipal Government Act, R.S.A. 2000, c. M-26 and will be used for assessment and provincial audit purposes. It is protected in accordance with the privacy provisions of the Municipal Government Act and the Freedom of Information and Protection of Privacy Act, R.S.A. 2000, c. F-25. Please contact Support and Information Management Services at 780-442-1495 or email assessment@edmonton.ca if you have any questions about the data collected.

Multi-Residential Annual Financial Statement

RFI-MF

12 Month Fiscal Period Ending _____

Account #: _____

Building Address: _____

Do the units include the following? Air Conditioning Yes No
Dishwasher Yes No

In Suite Laundry Yes No

Potential Gross Income

Potential Gross Rent
100% Occupancy (Unfurnished) _____
Potential Gross Rent
100% Occupancy (Furnished) _____
Office Rental _____
Commercial Rental _____
Commercial Recoveries _____

Miscellaneous Income

Parking Revenue _____
Laundry Rental _____
Other _____
Specify Other Rent _____

Total Income _____

Vacancy and Collection Loss

Apartment Vacancy in Dollars _____
of units vacant in reporting
period _____
Apartment Collection Loss _____
Apartment Incentives _____
Attach additional documents if necessary
Commercial Vacancy in Dollars _____
Commercial Collection Loss _____
Commercial Incentives _____

Operating Expenses Fixed

Property Taxes _____
Insurance _____
Business License _____
Other _____
Specify Other _____

Operating Expenses Variable

Management

Professional Fees _____
Administrative _____
Telephone / Pager / Internet _____

Caretaker

Salary _____
Rental Discount _____

Utilities

Water & Sewer _____ Incl. in Rent? Yes No
Waste Removal _____
Power _____ Incl. in Rent? Yes No
Gas _____ Incl. in Rent? Yes No
Cable _____

Supplies

Caretaker or Janitorial _____
Office _____

Repair & Maintenance

***Do Not** include Capital Expenditures

Repairs of Structure - Interior _____
Repairs of Structure - Exterior _____
Elevator _____
Other _____
Specify Other _____

Replacements

***Do Not** include Capital Expenditures

Appliances _____
Laundry Equip. _____
Flooring _____
Interior Painting _____
Other _____
Specify Other _____

Ground & Parking Area Maintenance

Lawn Maintenance & Snow
Removal _____
Other _____
Specify Other _____

Advertising

Miscellaneous

Other _____
Specify Other _____

Capital Expenditures / Major Maintenance / Repair *

Description _____

* Capital Expenditures are those expenses that do not occur annually, involving replacement of worn out or obsolete components where replacement is of significant duration and cost, i.e. Boilers, Windows and Doors, Roof, etc.

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)

A	Business Address	Unit number identifies the suite or unit of the business. Street address identifies the premises address of the business or building.
B	Business Name	Business Name and the Legal Entity leasing/occupying the space.
C	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. (B = Basement, M = 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	Improved space includes interior finishing items (ceiling finish, drywall, floor covering). Raw space has no interior finishing.
H	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 (M to M) if no lease exists.
J	Lease Renewal Date	Date of most recent lease renewal. (MMM/YYYY) Mark Month to Month (M to M) if no lease exists.
K	Expiry Date	Date that the lease agreement expires (MMM/YYYY).
L	New or Renewal or Step Up (N/R/S)	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 lease expires and the existing tenant signs a new lease term. Step-Up is a scheduled change to the rental rate within the term of the existing lease.
M	Net Rent	Rent that is stated in the lease agreement excluding operating or additional costs (\$/Month), Do NOT include GST.
N	Rent Escalation Month	Date when rent escalation (step up) commences.
O	Escalated Rent	Amount of the increase in rent (step up).
P	Operating Costs	Typical building expenses that are charged back to the tenant (such as 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
T	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.

