

# 2025 ANNUAL INCOME AND EXPENSE REPORT SUMMARY

Owner	_____	Property Name	_____
Mailing Address	_____	Property Address	_____
City/State/Zip	_____	Map/Block/Lot	_____ (Fill in from the Front Instruction Page)

1 Primary Property Use (Circle One)	A. Apartment	B. Office	C. Retail	D. Mixed Use	E. Shopping Center	F. Industrial	G. Other	_____
2 Gross Building Area (including Owner-Occupied Space)	_____	Sq. Ft.				6 Number of Parking Spaces		_____
3 Net Leasable Area	_____	Sq. Ft.				7 Actual Year Built		_____
4 Owner Occupied Area	_____	Sq. Ft.				8 Year Remodeled		_____
5 No. of Units	_____							

## INCOME - 2025

9 Apartment Rental (From Schedule A)	_____
10 Office Rentals (From Schedule B)	_____
11 Retail Rentals (From Schedule B)	_____
12 Mixed Rentals (From Schedule B)	_____
13 Shopping Center Rentals (From Schedule B)	_____
14 Industrial Rentals (From Schedule B)	_____
15 Other Rentals (From Schedule B)	_____
16 Parking Rentals	_____
17 Other Property Income	_____
18 TOTAL POTENTIAL INCOME (Add Line 9 thru Line 17)	_____
19 Loss Due to Vacancy and Credit	_____
20 EFFECTIVE ANNUAL INCOME (Line 18 Minus Line 19)	_____
21 Portion of Line 17 from R.E. Tax Reimbursements	_____
22 EFFECTIVE ANNUAL INCOME *BT (Line 20 minus Line 21)	_____

\*Before Taxes

## EXPENSES 2025

23 Heating/Air Conditioning	_____
24 Electricity	_____
25 Other Utilities	_____
26 Payroll (except managemnt, repair & decorating)	_____
27 Supplies	_____
28 Management	_____
29 Insurance	_____
30 Common Area Maintenance	_____
31 Leasing Fees/Commissions Advertising	_____
32 Legal and Accounting	_____
33 Elevator Maintenance	_____
34 Other (Specify)	_____
35 Other (Specify)	_____
36 Other (Specify)	_____
37 Other (Specify)	_____
38 Other (Specify)	_____
39 Security	_____
40 TOTAL EXPENSES *BT (Add lines 23 thru 39)	_____
41 Net Operating Income *BT (Line 20 minus Line 40)	_____
42 Capital Expenses	_____
43 Real Estate Taxes	_____
44 Mortgage Payment (Principal and Interest)	_____

**RETURN TO THE ASSESSOR ON OR BEFORE JUNE 1, 2026**

**SCHEDULE A - 2025 APARTMENT RENT SCHEDULE***Complete this Section for Apartment Rental activity only.*

UNIT TYPE	NO. OF UNITS		ROOM COUNT		UNIT SIZE	MONTHLY RENT		TYPICAL
	TOTAL	RENTED	ROOMS	BATHS	SQ. FT.	PER UNIT	TOTAL	LEASE TERM
EFFICIENCY								
1 BEDROOM								
2 BEDROOM								
3 BEDROOM								
4 BEDROOM								
OTHER RENTABLE UNITS								
OWNER/MANAGER/JANITOR OCCUPIED								
<b>SUBTOTAL</b>								
GARAGE/PARKING								
OTHER INCOME (SPECIFY)								

BUILDING FEATURES INCLUDED IN RENT  
(Please check all that apply)

☐Heat☐Garbage Disposal

☐Electricity☐Furnished Unit

☐Other Utilities☐Security

☐Air Conditioning☐Pool

☐Tennis Courts☐Dishwasher

☐Stove/Refrigerator

☐Other Specify \_\_\_\_\_

**SCHEDULE B - 2025 LESSEE RENT SCHEDULE***Complete this Section for all other rental activities except apartment rental*

NAME OF TENANT	LOCATION OF SPACE	LEASE TERM			ANNUAL RENT				PARKING		INTERIOR FINISH		
		START	END	SQ. FT.	BASE	ESC/CAM/OVERAGE	TOTAL	TOTAL PER SQ. FT.	NO. SPACES	ANNUAL RENT	OWN	TEN.	COST
<b>TOTAL</b>													

**COPY AND ATTACH IF ADDITIONAL PAGES ARE NEEDED.**

## VERIFICATION OF PURCHASE PRICE

PURCHASE PRICE \$ \_\_\_\_\_ DOWN PAYMENT \$ \_\_\_\_\_ DATE OF PURCHASE \_\_\_\_\_

(Check One)

FIRST MORTGAGE	\$ _____	INTEREST RATE	_____ %	PAYMENT SCHEDULE TERM	_____ YEARS
SECOND MORTGAGE	\$ _____	INTEREST RATE	_____ %	PAYMENT SCHEDULE TERM	_____ YEARS
OTHER	\$ _____	INTEREST RATE	_____ %	PAYMENT SCHEDULE TERM	_____ YEARS
CHattel MORTGAGE	\$ _____	INTEREST RATE	_____ %	PAYMENT SCHEDULE TERM	_____ YEARS

Fixed	Variable

DID THE PURCHASE PRICE INCLUDE A PAYMENT FOR: Furniture? \$ \_\_\_\_\_ Equipment? \$ \_\_\_\_\_ Other (Specify) \$ \_\_\_\_\_  
(Value) (Value) (Value)

HAS THE PROPERTY BEEN LISTED FOR SALE SINCE YOUR PURCHASE? (CIRCLE ONE) YES NO

IF YES, LIST THE ASKING PRICE \$ \_\_\_\_\_ DATE LISTED \_\_\_\_\_ BROKER \_\_\_\_\_

Remarks - Please explain any special circumstances or reasons concerning your purchase (i.e. vacancy, conditions of sale, etc.)

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### AFFIDAVIT

I DO HEREBY DECLARE UNDER PENALTIES OF FALSE STATEMENT THAT THE FOREGOING INFORMATION, ACCORDING TO THE BEST OF MY KNOWLEDGE, REMEMBRANCE AND BELIEF, IS A COMPLETE AND TRUE STATEMENT OF ALL THE INCOME AND EXPENSES ATTRIBUTABLE TO THE ABOVE IDENTIFIED PROPERTY (*Section 12-63c (d) of the Connecticut General Statutes*).

SIGNATURE	_____	NAME (Print)	_____	DATE	_____
TITLE	_____	TELEPHONE	_____		

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