

Investment Property Fact Sheet

Property Address: _____

Purchase Date: ____/____/____

Purchase Price: \$_____

Today's Date: ____/____/____

Current Market Value: \$_____

Financing Information

Down Payment: \$_____

Loan Balance: \$_____

Original Term of the Loan: _____years.

Monthly Payment: \$_____

Interest Rate: _____

Acquisition & Closing Costs: \$_____
(points, origination fees, etc.)

Dollars Spent on Capital Improvements: \$_____
(building improvements other than general maintenance)

Anticipated Appreciation in Market Value or Increase in Rent: _____% (over next 5 years)

Property Operating Data

Annual Income

_____ Gross Rental Income

_____ Other Income on Property (parking, vending machines, etc.)

Annual Expenses

_____ Property Taxes

_____ Property Management Fees

_____ Landscaping

_____ Security

_____ Janitorial or Cleaning Fees

_____ Property Insurance

_____ Association Dues

_____ Trash Removal

_____ Supplies

_____ Miscellaneous Expenses

Utilities:

_____ Cable

_____ Electricity

_____ Telephone

_____ Water/Sewer

Return To:

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