



# TENANT LEASE WORKSHEET

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

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

**NOTE:** This form is used by a leasing agent when representing a prospective commercial tenant in need of space, to determine the tenant's motivations, business needs and financial status, and the type of property and lease terms sought by the tenant.

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

## 1. GENERAL INFORMATION:

Tenant's name \_\_\_\_\_  
Business address \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_  
Email \_\_\_\_\_  
Type of business \_\_\_\_\_

## 2. Information on space presently occupied by Tenant:

- 2.1 Type of building:       Multi-tenant                       Free-standing
- 2.2 Location:               Good                                       Adequate                       Poor
- 2.3 Suitability to business:       Good                                       Adequate                       Poor
- 2.4 Square feet \_\_\_\_\_ determined by \_\_\_\_\_

- 2.5 Tenant utility costs:
- a.     Lighting/electrical. .... \$ \_\_\_\_\_
- b.     Gas. .... \$ \_\_\_\_\_
- c.     Water. .... \$ \_\_\_\_\_
- d.     \_\_\_\_\_ . .... \$ \_\_\_\_\_
- TOTAL** ..... \$ \_\_\_\_\_

- 2.6 Tenant operating costs:
- a.     Common area maintenance (CAM). .... \$ \_\_\_\_\_
- b.     Casualty insurance. .... \$ \_\_\_\_\_
- c.     Use fees. .... \$ \_\_\_\_\_
- d.     Real property taxes. .... \$ \_\_\_\_\_
- e.     Maintenance. .... \$ \_\_\_\_\_
- f.     Assessments. .... \$ \_\_\_\_\_
- g.     Property management. .... \$ \_\_\_\_\_
- h.     Janitorial services. .... \$ \_\_\_\_\_
- i.     Parking. .... \$ \_\_\_\_\_
- j.     Fire insurance. .... \$ \_\_\_\_\_
- k.     \_\_\_\_\_ . .... \$ \_\_\_\_\_
- l.     \_\_\_\_\_ . .... \$ \_\_\_\_\_
- TOTAL** ..... \$ \_\_\_\_\_

- 2.7 Rooms/offices (number of):
- Offices . . . . . \_\_\_\_\_
- Reception area. . . . . \_\_\_\_\_
- Storage rooms . . . . . \_\_\_\_\_
- Kitchen. . . . . \_\_\_\_\_
- Conference rooms . . . . . \_\_\_\_\_
- Lab/R&D rooms . . . . . \_\_\_\_\_
- Restrooms. . . . . \_\_\_\_\_
- Dressing rooms . . . . . \_\_\_\_\_
- Computer room . . . . . \_\_\_\_\_
- Hallways . . . . . \_\_\_\_\_
- Lunchroom . . . . . \_\_\_\_\_
- \_\_\_\_\_ . . . . . \_\_\_\_\_
- \_\_\_\_\_ . . . . . \_\_\_\_\_
- \_\_\_\_\_ . . . . . \_\_\_\_\_
- \_\_\_\_\_ . . . . . \_\_\_\_\_

2.8 Tenant improvements and trade fixtures \_\_\_\_\_  
\_\_\_\_\_

**3. information on space sought by tenant:**

3.1 Type of building:     Multi-tenant                       Free-standing                                       Rural

3.2 Location preference:  Downtown                       Suburbs  
 City \_\_\_\_\_ County \_\_\_\_\_

- 3.3 Access needed:
- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Residential    | <input type="checkbox"/> Legal/civic centers   | <input type="checkbox"/> Shopping centers      |
| <input type="checkbox"/> Agricultural   | <input type="checkbox"/> Hotels                | <input type="checkbox"/> Restaurants           |
| <input type="checkbox"/> Industrial     | <input type="checkbox"/> Libraries             | <input type="checkbox"/> Redevelopment areas   |
| <input type="checkbox"/> Mountain areas | <input type="checkbox"/> Universities/Colleges | <input type="checkbox"/> Government-state      |
| <input type="checkbox"/> Freeways       | <input type="checkbox"/> Financial services    | <input type="checkbox"/> Government-federal    |
| <input type="checkbox"/> Public transit | <input type="checkbox"/> Warehouses            | <input type="checkbox"/> Publishing houses     |
| <input type="checkbox"/> Parking        | <input type="checkbox"/> Office centers        | <input type="checkbox"/> Manufacturing centers |
| <input type="checkbox"/> Airports       | <input type="checkbox"/> Convention centers    | <input type="checkbox"/> Disposal facilities   |
| <input type="checkbox"/> Coastal        | <input type="checkbox"/> Sports facilities     | <input type="checkbox"/> Trains                |
| <input type="checkbox"/> Shipyards      | <input type="checkbox"/> Near competition      | <input type="checkbox"/> _____                 |
| <input type="checkbox"/> Trucking       | <input type="checkbox"/> Medical/hospital      |  |

3.4 Space needs:  
 a. Square feet \_\_\_\_\_

- b. Rooms/offices:
- |   |       |   |       |
|---|-------|---|-------|
| <input type="checkbox"/> Offices          | _____ | <input type="checkbox"/> Storage rooms  | _____ |
| <input type="checkbox"/> Conference rooms | _____ | <input type="checkbox"/> Restrooms      | _____ |
| <input type="checkbox"/> Computer rooms   | _____ | <input type="checkbox"/> Lunch rooms    | _____ |
| <input type="checkbox"/> Reception area   | _____ | <input type="checkbox"/> Kitchen        | _____ |
| <input type="checkbox"/> Lab/R&D rooms    | _____ | <input type="checkbox"/> Dressing rooms | _____ |
| <input type="checkbox"/> Hallways         | _____ | <input type="checkbox"/> _____          | _____ |

- 3.5 Physical plant needs:
- |                                     |       |  |       |
|-------------------------------------|-------|--|-------|
| <input type="checkbox"/> Signs      | _____ | <input type="checkbox"/> Ceilings      | _____ |
| <input type="checkbox"/> Stairwells | _____ | <input type="checkbox"/> Walls         | _____ |
| <input type="checkbox"/> Finishing  | _____ | <input type="checkbox"/> Floors        | _____ |
| <input type="checkbox"/> Partitions | _____ | <input type="checkbox"/> Painting      | _____ |
| <input type="checkbox"/> Carpeting  | _____ | <input type="checkbox"/> Ramps/parking | _____ |

- 3.6 Utility needs:
- |  |       |                                   |       |
|--|-------|-----------------------------------|-------|
| <input type="checkbox"/> Lighting/electrical | _____ | <input type="checkbox"/> Computer | _____ |
| <input type="checkbox"/> Water               | _____ | <input type="checkbox"/> Gas      | _____ |

**4. Tenant business goals:**

4.1 Short term (3-5 years)  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

4.2 Long term (5-10 years)  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**5. Lease terms on space now occupied by Tenant:**

- 5.1 Type:  Office                       Shopping center                       Retail  
                      Industrial                       Light business
- 5.2 Term \_\_\_\_\_ Expiration date \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_
- 5.3 Base rent \$ \_\_\_\_\_ payable \_\_\_\_\_
- 5.4 Current rent \$ \_\_\_\_\_ payable \_\_\_\_\_
- 5.5 Rent based on:                       Per sq. ft.                       Percent gross sales

- 5.6 Rental adjustments based on:  CPI  Reappraisal  
 Graduated  Fixed  \_\_\_\_\_
- 5.7 Security deposit . . . . . \$ \_\_\_\_\_
- 5.8 Prepaid rent . . . . . \$ \_\_\_\_\_
- 5.9 Option to renew/extend:  Yes  No
- 5.10 Option to buy:  Yes  No
- 5.11 Option to lease additional space:  Yes  No
- 5.12 Lease assignment:  Freely  Landlord consent
- 5.13 Other \_\_\_\_\_
- 5.14 Landlord's name \_\_\_\_\_  
Business address \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_  
Agent's name \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_

**6. Lease terms sought:**

- 6.1 Desired monthly base rent \$ \_\_\_\_\_
- 6.2 Rent based on:  Per sq. ft.  Percent gross sales
- 6.3 Rental adjustments based on:  CPI  Reappraisal  
 Graduated  Fixed  \_\_\_\_\_
- 6.4 Landlord responsibility for utilities:  
 Lighting/electrical  Gas  
 Water  \_\_\_\_\_
- 6.5 Landlord responsibility for operating costs:  
 Maintenance  Insurance  
 Property mgmt.  Parking  
 Use fees  Janitorial  
 Taxes  \_\_\_\_\_
- 6.6 Common area maintenance (CAM) provision cap:  
 \_\_\_\_\_ Per sq. ft.  \_\_\_\_\_ % Per year
- 6.7 Security deposit . . . . . \$ \_\_\_\_\_
- 6.8 Prepaid rents . . . . . \$ \_\_\_\_\_
- 6.9 Option to renew:  Yes  No [See **RPI** Form 565]
- 6.10 Option to buy:  Yes  No [See **RPI** Form 161]
- 6.11 Option to lease additional space:  Yes  No [See **RPI** Form 579-1]
- 6.12 Lease assignment:  Freely  Landlord consent [See **RPI** Form 595]
- 6.13 Other \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_