



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 _____
Tenant's financial condition _____
Tenant's creditworthiness: Good Adequate Poor

2. Tenant business goals:

2.1 Short term (3-5 years)

2.2 Long term (5-10 years)

3. Information on space presently occupied by Tenant:

3.1 Type of building: Multi-tenant Free-standing
3.2 Location: Good Adequate Poor
3.3 Suitability to business: Good Adequate Poor
3.4 Square feet _____ determined by _____

3.5 Tenant utility costs:
a. Lighting/electrical. \$ _____
b. Gas. \$ _____
c. Water. \$ _____
d. _____ \$ _____
TOTAL \$ _____

3.6 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 \$ _____

3.7 Rooms/offices (number of):
 Offices _____
 Reception area _____
 Storage rooms _____
 Kitchen. _____
 Conference rooms _____

- Lab/R&D rooms _____
- Restrooms _____
- Dressing rooms _____
- Computer room _____
- Hallways _____
- Lunchroom _____
- _____
- _____
- _____
- _____

3.8 Tenant improvements and trade fixtures _____

4. Information on space sought by Tenant:

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

4.2 Location preference: Downtown Suburbs
City _____ County _____

4.3 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 | |

4.4 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"/> _____ |

4.5 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 _____ |

4.6 Utility needs:

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

4.7 Heating and air conditioning needs _____

4.8 Parking/docking/shipping requirements _____

4.9 Response time for police and fire departments _____

4.10 Other Tenant needs _____

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 _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____