

Request for Information (RFI)
Office, Shopping Centre & Retail Valuation Groups

In accordance with section 9(3) of the *Matters Relating to Assessment Complaints Regulation* “**A composite assessment review board must not hear any evidence from a complainant relating to information that was requested by the assessor under section 294 or 295 of the Act but was not provided to the assessor**”.

Please complete the following:

- A. RFI-1 (Owner Contact and Certification)
- B. RFI-2 (Building Area Form)
- C. RFI-P (Parking Details)

In addition to the above:

If this property is **fully or partially tenant occupied**, complete 1. If this property is **owner occupied** please complete 2.

1. FULLY OR PARTIALLY TENANT OCCUPIED

- A. **RFI-C (Commercial Tenant Roll Form)**
 - The completed RFI-C form must include the most current summary of the tenancy and vacancy of each building located on site.
 - For **Owner Occupied and vacant space**, please complete Columns A to E and Column M
 - For each tenant that pays additional rent (percent rent based on sales, etc), record this amount in the column “Other Rent”
 - Identify Land Lease in “Column P” and provide building size on land lease in “Column E”
- B. **Please provide an Annual Financial Statement** relating to the entire operations of the real property for your fiscal year ending 2015

2. OWNER OCCUPIED

- A. **RFI-3 (Yearly Expenses - Owner Occupied Only)**

The following statement applies to bullets 1A, 1B and 2A.

Pursuant to section 295 of the *Municipal Government Act*, R.S.A. 2000, c. M-26 the Assessment and Taxation Branch requires the above information in that it is necessary in preparing the assessment.

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 linear property, under section 492(1) about an assessment if the person has failed to provide the information requested under subsection (1) within 60 days from the date of the request.



Rod Risling, AMAA, CAE
Branch Manager and City Assessor
Assessment and Taxation Branch

This information is due on or before APRIL 15, 2016.



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: 2017 Preliminary Assessment Roll Consultation (Pre-Roll)

The Pre-Roll Consultation period, typically held between mid-October and mid-November, provides you with the opportunity to exchange information with us and to review the details of your property. As part of this process you can also review your preliminary property assessment prior to it being finalized.

☐ Yes, I would like to receive an invitation to participate in pre-roll discussions

Note: There may be some circumstances where a property may not qualify to engage in Pre-Roll Consultation.

Section D: 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, changes in size, modifications, or upgrades to the property between January 1 and December 31, **2015** please complete the following table. If there has been **no** change to the properties, please simply advise us that there have been no changes.

☐ No Change Gross Building Area: Outside measurements of building | Gross Leasable Area: See definition on last page

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

Yearly Expenses - Owner Occupied Only

RFI-3

Power			Waste Removal	
Water & Sewer			Insurance	
Gas			Structural Repairs	

Parking Details

RFI-P

Parking Details	Total Number of Stalls	Percentage 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								

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

You can submit documents via mail to Main Floor, Chancery Hall, 3 Sir Winston Churchill Square, Edmonton, AB T5J 2C3, fax to (780) 496-1986, or e-mail (.pdf, .xls) to assessment@edmonton.ca



RFI-C Page _____ of _____

ALL UNITS INCLUDING VACANT MUST BE LISTED ON THIS FORM AND INCLUDED IN THE TOTAL. DO NOT INCLUDE G.S.T

Total Leasable Area (sq. ft)
(including all leased and vacant space) _____ 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	Floor	Physical location of the tenant’s space within the building. (B = Basement, M = Main, MZ = Mezzanine, 2 = 2nd Floor etc)
E	Gross Leased Area	The total floor area designed for the occupancy and exclusive use of the tenants, including any basements and mezzanines; measured from the center of joint partitioning to the outside wall surface.
F	Tenant Space Finished	Was the space rented as an unfinished shell (Raw) or was the space previously (IMP) improved and accepted by the new leasee
G	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
H	Lease Renewal Date	Date of most recent lease renewal. (MMM/YYYY) Mark Month to Month (M to M) if no lease exists
I	Expiry Date	Date that the lease agreement expires (MMM/YYYY).
J	Net Rent	Rent that is stated in the lease agreement excluding operating or additional costs (\$/Month), Do NOT include GST
K	Gross Rent	Rent that is stated in the lease agreement including operating or additional costs (\$/Month).
L	Operating Costs	Typical building expenses that are charged back to the tenant (such as utilities, property taxes, etc). Do NOT Include GST.
M	Other Rent	Any additional rent charged for storage, parking, signage (\$/Month)
N	Description Of Other Rent	Description of what other rent is. I.E. - Signage
O	Rent Escalation Month	Date when rent escalation (step up) commences
P	Escalated Rent	Amount of the increase in rent (step up)
Q	Free Rent	Net amount of free rent and number of months it was given.
R	Tenant Improvements	A negotiated sum a landlord is willing to spend to customize space for the needs of a particular tenant, in the prior 18 months.
S	Tenant Inducements	Negotiated funds given to the tenant that are not specific or tied to improving leased space, in the prior 18 months.