

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



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. **Provide a Commercial Tenant Roll (RFI-C)** which include the most current summary of the tenancy and vacancy of each building located on site.
  - . You may provide the information:
    - By logging into the secure website: <https://assessmentrfi.edmonton.ca>
    - Using the Excel template located on our website [www.edmonton.ca/assessment](http://www.edmonton.ca/assessment)
    - In your own format which includes the following information:  
Business Address, Business Name, Occupancy Type, Space Type, Tenant Space Finished, Floor, Gross Leased Area, Lease Negotiated/Start/Renewal/Expiry Dates, Net Rent, Rent Escalation Month/Rent, Operating Costs, Gross Rent, Other Rent/Description, Tenant Inducement Type/Amount, Tenant/Landlord Improvements.
    - By completing the RFI-C form provided. Photocopy as required.
  - . For **Owner Occupied and vacant space**, please complete columns A (Business Address) to F (Gross Leased Area) and column P (Operating Costs).
  - . For each tenant that pays additional rent (percent rent based on sales, etc), record this amount in columns R (Other Rent) and S (Description of Other Rent).
  - . Identify Land Leases in a separate line on the tenant roll.
- B. **Please provide an Annual Financial Statement** relating to the entire operations of the real property for your fiscal year ending 2019 in your own format.

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

Cate Watt, AMAA  
Branch Manager and City Assessor  
Assessment and Taxation Branch

This information is requested by APRIL 17, 2020. Deadline has been **extended** to October 1, 2020, but we would be highly appreciative if responses could be received before July 1, 2020 which is the valuation date.

# 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: 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, **2019**, please complete the following table. If there has been **NO** change to the properties, please simply advise us that there have been no changes.

Gross Building Area: Outside measurements of building

**No Change** Leasable Area: The total floor area designed for the occupancy and exclusive use of the tenants, including any basements and mezzanines.

Building Size (in square feet):	Gross Building Area	Leasable Area	Building Size (in square feet):	Gross Building Area	Leasable Area	Building Size (in square feet):	Gross Building Area	Leasable Area
Basement			3 <sup>rd</sup> Floor			7 <sup>th</sup> Floor		
Main Floor			4 <sup>th</sup> Floor			8 <sup>th</sup> Floor		
Mezzanine			5 <sup>th</sup> Floor			9 <sup>th</sup> Floor		
2 <sup>nd</sup> Floor			6 <sup>th</sup> Floor			10 <sup>th</sup> 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 <b>Heated</b>								
Parkade Above Ground <b>Non-Heated</b>								
Underground								

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

You can submit documents via mail to P.O. Box 1935, Station Main, Edmonton, AB T5J 2P3,  
fax to (780) 496-1986, or e-mail (.pdf, .xls) to [assessment@edmonton.ca](mailto:assessment@edmonton.ca)



## 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	Space Type	Office, Retail, WHSE, Storage
E	Floor	Physical location of the tenant's space within the building. (B = Basement, M = Main, MZ = Mezzanine, 2= 2nd floor etc)
F	Gross Leased Area	The total floor area designed for the occupancy and exclusive use of the tenants, including any basements and mezzanines.
G	Tenant Space Finished	<b>Improved</b> space includes interior finishing items (ceiling finish, drywall, floor covering). <b>Raw</b> space has no interior finishing.
H	Lease Negotiated Date	The date the lease was signed and agreed upon.
I	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.
J	Lease Renewal Date	Date of most recent lease renewal. (MMM/YYYY) Mark Month to Month (M to M) if no lease exists.
K	Expiry Date	Date that the lease agreement expires (MMM/YYYY).
L	New or Renewal or Step Up ( N/R/S)	<b>New</b> is a new lease agreement of a tenant occupying a space that was vacant or occupied by a previous tenant, may include tenant expansion. <b>Renewal</b> is when a lease expires and the existing tenant signs a new lease term. <b>Step-Up</b> is a scheduled change to the rental rate within the term of the existing lease.
M	Net Rent	Rent that is stated in the lease agreement excluding operating or additional costs (\$/Month), Do NOT include GST.
N	Rent Escalation Month	Date when rent escalation (step up) commences.
O	Escalated Rent	Amount of the increase in rent (step up).
P	Operating Costs	Typical building expenses that are charged back to the tenant (such as utilities, property taxes, etc). Do NOT Include GST.
Q	Gross Rent	Rent that is stated in the lease agreement including operating or additional costs (\$/Month).
R	Other Rent	Any additional rent charged for percent rent, signage, etc (\$/Month).
S	Description Of Other Rent	Description of what other rent is. I.E. - Signage
T	Tenant Inducement Type	Description of what the tenant inducement is. I.E. Free Rent, Cash Payment etc.
U	Inducement Amount	The total dollar amount of any inducements paid to the tenant for this space.
V	Tenant Improvements	A negotiated sum a tenant is willing to spend to customize space for their needs (Only include items within the lease term, Don't include chattels).
W	Landlord Improvements	A negotiated sum a landlord is willing to spend to customize space for the needs of a particular tenant, within the lease term.