

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

For FULLY OR PARTIALLY TENANT OCCUPIED, please complete the following:

- RFI-1 (Owner Contact and Certification)
- RFI-2 (Building Area Form)
- RFI-P (Parking Details)
- RFI-C (Commercial Tenant Roll)
Most recent date available, April 2023 and future leases commencing before July 1.
- RFI-I (Income Addendum)
Details of any tenant abatements, deferrals and collection loss
- Annual Financial Statement
Most current available relating to the entire operations of the real property

For OWNER OCCUPIED, please complete the following:

- RFI-1 (Owner Contact and Certification)
- RFI-2 (Building Area Form)
- RFI-3 (Yearly Expenses - Owner Occupied Only)
- RFI-P (Parking Details)

A. RFI-C (Commercial Tenant Roll) and RFI-I (Income Addendum) which includes the most current summary of the tenancy and vacancy of each building located on site. Information can be provided either on our secure website, by filling out a form or in your own format:

- Secure Website: assessmentrfi.edmonton.ca
Visit the assessmentrfi.edmonton.ca and login using the password in the letter sent by Assessment & Taxation
- Forms: edmonton.ca/assessment, scroll down to the forms section and click on Request for Information.
Either:
 - Choose the Request for Information forms for Office, Shopping Centre, Retail, or;
 - Choose the Tenant Roll Upload Template: Commercial, or;
 - Choose the Income Addendum Template.
- Submit in your own format to assessment@edmonton.ca

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)

If submitting the Commercial Tenant roll in your own format, ensure it includes the following: Business Address, Business Name, Occupancy Type, Space Type, Tenant Space Finished, Floor, Gross Leased Area, Lease Negotiated/Start/Renewal/Expiry Dates, Net Rent, Rent Change Month/Rent, Operating Costs, Gross Rent, Other Rent/Description, Tenant Inducement Type/Amount, Tenant/Landlord Improvements. 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.
Excel format is preferred whenever possible.

If submitting Annual Financial Statements in your own format, please ensure it includes the following: 12 month fiscal period ending, Account, Building Address, Actual Reported Annual Income, Operating Cost Recovery, Actual Reported Expenses, Maintenance & Repairs, Administrative and Non-Recoverable Expenses. Most current available relating to the entire operations of the real property.

Pursuant to section 295 of the Municipal Government Act, R.S.A. 2000, c. M-26, the Assessment and Taxation Branch requires the requested information as it is necessary to prepare the assessment of this and other similar properties and to ensure that this property is not over assessed in relation to other similar properties.

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.

This information is due on or before **May 11, 2023.**

Owner Contact and Certification

RFI-1

Account: _____

Premise Address: _____

Section A: Contact Information

Name: _____

Position: _____

Company Name: _____

Phone Number: _____

Fax Number: _____

E-Mail Address: _____

Section B: Additional Information

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 _____

Which of the following best describes your property?

- Fully owner occupied** - A property is considered owner occupied if the property owner physically occupies the land and/or buildings
- Fully tenant occupied** - A property is considered tenant occupied if the property has an arm's length lease Partially owner occupied and partially tenant occupied
- Partially owner occupied and partially tenant occupied**

Between July 1, 2022 and June 1, 2023, have any tenants abandoned or breached leases in the subject property? Please provide details on the RFI-I, Income Addendum. Yes No

Between July 1, 2022 and June 1, 2023, have any leases been amended? Please provide details on RFI-I Income Addendum or provide copies of any lease amending agreements. Yes No

Additional details or comments:

Section C: Certification I hereby certify that the attached information is true and correct.

Signature _____

Date: _____

Building Area Form

RFI-2

Please provide a breakdown of the gross leasable area within this building.

Gross Building Area: Outside measurements of building.

Gross 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	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			3 rd Floor			7 th Floor		
Main Floor			4 th Floor			8 th Floor		
Mezzanine			5 th Floor			9 th Floor		
2 nd Floor			6 th Floor			10 th Floor		

Yearly Expenses - Owner Occupied Only

RFI-3

Power		Waste Removal	
Water & Sewer		Insurance	
Gas		Structural Repairs	

Return completed forms by:

Email: assessment@edmonton.ca • Mail: P.O. Box 1935, Station Main, Edmonton, AB T5J 2P3 • Fax: (780) 496-1986

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.

Return completed forms by:

Email: assessment@edmonton.ca • **Mail:** P.O. Box 1935, Station Main, Edmonton, AB T5J 2P3 • **Fax:** (780) 496-1986

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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, commercial retail unit, convenience store, bank, restaurant, fast food, auto service, drug store, grocery store, anchor, storage, warehouse, theatre
E	Floor	Physical location of the tenant's space within the building. (BSMT = Basement, MAIN, MEZZ=Mezzanine, FLR02=2nd floor etc.)
F	Gross Leasable Area	The total floor area designed for the occupancy and exclusive use of the tenants, including any basements and mezzanines.
G	Tenant Space Finished	Improved space includes interior finishing items (ceiling finish, drywall, floor covering, heating, ventilation ductwork, electrical systems and other finishes). Raw 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 (MTM) if no lease term 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/Step Down (N/R/S)	New is a new lease agreement of a tenant occupying a space that was vacant or occupied by a previous tenant, may include tenant expansion. Renewal is when a new lease agreement occurs with an existing tenant, where the rents and terms are negotiated based on market conditions at the time of renewal. Step Up/Step Down is a scheduled change to the rental rate within the term of the existing lease or exercised renewal options with predetermined rent and lease terms.
M	Net Rent	Rent that is stated in the lease agreement excluding operating or additional costs (\$/Month), Do NOT include GST.
N	Rent Change Month	Date when rent change (step up/step down) commences.
O	Rent Change	Amount of the change in rent (step up/step down).
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, do not 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.



Commercial Tenant Roll RFI-C

Whenever possible, please provide the rent roll in Excel format (.xls) by email to assessment@edmonton.ca and include all relevant dates including step-up and renewal dates.

Building Name: _____ Building Address: _____ Account: _____ Building _____ of _____

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

A		Space Description					Lease Dates					Annual Lease Details							Tenant Inducements		Tenant Improvements		
		B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
Business Address(es) Unit # Street Address		Business Name(s) and Legal Entity	Occupancy Type (Owner, Tenant, Vacant)	Space Type (Office, Retail, WHSE, Land Lease, Storage)	Floor (Bsmt, Main, Mezz, 2nd flr, etc)	Gross Leased Area (Square Feet)	Tenant Space Finished Raw (RAW) / Improved (IMP)	Lease Negotiated Date (MM/YYYY)	Lease Start Date (MM/YYYY)	Lease Renewal Date (MM/YYYY)	Expiry Date (MM/YYYY)	New, Renewal or Step Up/ Step Down (N/R/S)	Net Rent (\$/Month)	Rent Change (Step Up/ Step Down) Month / Year (MM/YYYY) (Next Scheduled Rental Increase in lease agreement)	Rent Change (Step Up/ Step Down) (\$/Month)	Operating Costs (e.g. Util., Taxes, Etc.) (\$/Month)	Gross Rent (= Net Rent + Other Rents + Operating Cost) (\$/Month)	Other Rent (\$/Month)	Description of Other Rent (e.g. Sign, %Rent, Etc)	Tenant Inducement Type (ie. Free Rent, Cash Payment etc.)	Inducement Amount (\$/sq.ft or Total \$ amount)	Tenant Improvements (\$/sq.ft or Total \$ amount)	Landlord Improvements (\$/sq.ft or Total \$ amount)
101	EXAMPLE: 12345 Anywhere Street	Business XYZ Ltd.	Tenant	Office	M	2000	IMP	Jan/2010	Jan/2011	Jan/2017	Dec/2021	R	3500	Aug/2019	3750	2500	6000	25	Sign	Free Rent	4500 or 2.25 \$/sqft	6500 or 3.25 \$/sqft	4200
102	EXAMPLE: 12345 Anywhere Street	Vacant	Vacant	CRU	M	3000	IMP								3500								

Total Leasable Area (sq. ft) _____ (including all leased and vacant space) Initial _____ Date: _____

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Guide To Completion Of RFI-I (Income Addendum)

The following overview of the fields located on the "Income Addendum" RFI-I form is intended to assist you in the completion of the form.

This includes detailed information on tenant abatements, deferrals, and collection loss.

UNIT NUMBER	Unit number identifies the suite or unit of the business.
BUSINESS ADDRESS	Street address identifies the premises address of the business or building.
BUSINESS NAME/ LEGAL ENTITY	Business Name and the Legal Entity leasing / occupying the space
BASE RENT	
Year	July 2022 to June 2023
Due/Amount per lease agreement (\$)	Rent that is currently being paid as stated in the lease agreement, excluding operating or additional costs (\$/Month). Do NOT include GST
Collected from Tenant (\$)	Monies received directly from Tenant
ABATEMENT* (\$)	*Abatement: Reduction in the rental amount that is not to be paid back.
DEFERRAL ** (\$)	**Deferral: Unpaid contractual rent that is agreed to be paid at a future date.
OPERATING COSTS	
Year	July 2022 to June 2023
Due/Amount per lease agreement (\$)	Rent that is currently being paid as stated in the lease agreement, excluding operating or additional costs (\$/Month). Do NOT include GST.
Collected from Tenant (\$)	Monies received directly from Tenant
ABATEMENT* (\$)	*Abatement: Reduction in the rental amount that is not to be paid back.
DEFERRAL ** (\$)	**Deferral: Unpaid contractual rent that is agreed to be paid at a future date.



RFI-I Commercial Income Addendum

Request for Information for Office, Shopping Centres, Retail, Parkade and Industrial Valuation Groups Assessment and Taxation

P.O. Box 1935, Station Main
Edmonton, AB T5J 2P3

Phone: 780-442-1495
Fax: 780-196-1986
email: assessment@edmonton.ca
edmonton.ca/assessment

Account: _____

Property Address: _____

ONLY PROVIDE DETAILS ON SPACES AFFECTED BY ABATEMENT AND/OR DEFERRAL.

			BASE RENT			UNCOLLECTED BASE RENT		OPERATING COSTS			UNCOLLECTED OPERATING COSTS	
Unit Number	Business Address	Business Name(s) & Legal Entity	Year	Due/Amount per lease agreement (\$)	Collected from Tenant (\$)	Abatement* (\$)	Deferral* (\$)	Year	Due/Amount per lease agreement (\$)	Collected from Tenant (\$)	Abatement* (\$)	Deferral* (\$)
			Jul-22					Jul-22				
			Aug-22					Aug-22				
			Sep-22					Sep-22				
			Oct-22					Oct-22				
			Nov-22					Nov-22				
			Dec-22					Dec-22				
			Jan-23					Jan-23				
			Feb-23					Feb-23				
			Mar-23					Mar-23				
			Apr-23					Apr-23				
			May-23					May-23				
			Jun-23					Jun-23				

*Abatement: Reduction in the rental amount that is not to be paid back

**Deferral: Unpaid contractual rent that is agreed to be paid at a future date.

			BASE RENT			UNCOLLECTED BASE RENT		OPERATING COSTS			UNCOLLECTED OPERATING COSTS	
Unit Number	Business Address	Business Name(s) & Legal Entity	Year	Due/Amount per lease agreement (\$)	Collected from Tenant (\$)	Abatement* (\$)	Deferral* (\$)	Year	Due/Amount per lease agreement (\$)	Collected from Tenant (\$)	Abatement* (\$)	Deferral* (\$)
			Jul-22					Jul-22				
			Aug-22					Aug-22				
			Sep-22					Sep-22				
			Oct-22					Oct-22				
			Nov-22					Nov-22				
			Dec-22					Dec-22				
			Jan-23					Jan-23				
			Feb-23					Feb-23				
			Mar-23					Mar-23				
			Apr-23					Apr-23				
			May-23					May-23				
			Jun-23					Jun-23				

			BASE RENT			UNCOLLECTED BASE RENT		OPERATING COSTS			UNCOLLECTED OPERATING COSTS	
Unit Number	Business Address	Business Name(s) & Legal Entity	Year	Due/Amount per lease agreement (\$)	Collected from Tenant (\$)	Abatement* (\$)	Deferral* (\$)	Year	Due/Amount per lease agreement (\$)	Collected from Tenant (\$)	Abatement* (\$)	Deferral* (\$)
			Jul-22					Jul-22				
			Aug-22					Aug-22				
			Sep-22					Sep-22				
			Oct-22					Oct-22				
			Nov-22					Nov-22				
			Dec-22					Dec-22				
			Jan-23					Jan-23				
			Feb-23					Feb-23				
			Mar-23					Mar-23				
			Apr-23					Apr-23				
			May-23					May-23				
			Jun-23					Jun-23				