

## Confidential Financial Planning Questionnaire - Real Estate Addendum

Description of Property: \_\_\_\_\_

City, State: \_\_\_\_\_ Owner: \_\_\_\_\_

### Purchase and Value Information

Year Purchased	Purchase Price	Down Payment	Current Market Value

### Depreciation and Sale Information

Adjusted Cost Basis	Depreciation Years Remaining	Appreciation Rate	Age at Sale	Sales Cost (percentage)

### Income

Annual Rent	Annual Increase Rate (Rent)	Vacancy Rate (percentage)	Other Income	Annual Increase Rate (Other)

Is net income being reinvested into retirement/investment assets? ( Y / N )

### Mortgages

	Original Balance	Current Balance	Interest Rate	Monthly Payment (P&I)	Date Opened
Primary					
Secondary					

### Expenses

	Monthly Amount	Annual Amount	Increase Rate
Insurance			
Management			
Other			
Property Tax			
Repairs and Maintenance			

