


INPUT INSTRUCTIONS: Please complete this form accurately and in its entirety. All the information requested is needed to complete the forthcoming INVESTMENT PROPERTY ANALYSIS (IPA) report. Entries are needed in ALL the green shaded input cells. Additional needed (requested) documents are listed on the bottom of this form.

 ENTER CLIENT NAME	INVESTMENT PROPERTY ANALYSIS (IPA) INPUT FORM					
	Property 1	Property 2	Property 3	Property 4	Property 5	Property 6
PROPERTY INFORMATION	Enter Street Address Enter City, State Zip	Enter Street Address Enter City, State Zip	Enter Street Address Enter City, State Zip	Enter Street Address Enter City, State Zip	Enter Street Address Enter City, State Zip	Enter Street Address Enter City, State Zip
Property Type (single-family, multi-family, commercial)						
Number Of Rental Units						
Acquisition Date - month/day/year						
Purchase Price						
Owner's Opinion of Current Value						
Income:	-----	-----	-----	-----	-----	-----
Scheduled Monthly Rent-s						
Total Annual Rent-s	0	0	0	0	0	0
Other Monthly Income (fees, laundry, RUBS, NNN, etc.)						
Other Income (Annual)	0	0	0	0	0	0
TOTAL ANNUAL PROJECTED INCOME	\$0	\$0	\$0	\$0	\$0	\$0
Owner Paid Expenses (annual):	-----	-----	-----	-----	-----	-----
Property Taxes						
Property Insurance						
Owner Paid Utilities						
Average Annual Repairs, Maintenance & Related						
Average Annual Landscaping / Yard Maintenance						
Professional Property Management (if applicable)						
Miscellaneous (all other not included above)						
Proj. "Avg. Annual" Capital Expenditures (next 3 years):	-----	-----	-----	-----	-----	-----
Includes: Roof, Siding, Windows, Remodel, Etc.						
Other:	-----	-----	-----	-----	-----	-----
Current Annual Depreciation Expense (see tax return)						
1031 Exchange Into Property (YES/NO)						
LOAN/MORTGAGE INFORMATION						
Loan Origination Date - month/day/year						
Original Loan Amount						
Approximate Current Loan Balance						
Interest Rate						
Amortization Term						
OWNER/INVESTOR INFORMATION						
Effective Tax Rate						
Marginal Tax Rate						
Average Annual Income (all sources)						
Approximate Net Worth						
Retired (YES/NO)						
DOCUMENTS NEEDED (Requested)						
Personal Financial Statement	ATTACH					
Schedule Of Real Estate Owned	ATTACH					
Profit & Loss (Income/Expense) Each Property	ATTACH	ATTACH	ATTACH	ATTACH	ATTACH	ATTACH
Rent-roll (by unit) Each Property	ATTACH	ATTACH	ATTACH	ATTACH	ATTACH	ATTACH
Copy Of "Schedule E" Each Property (see tax return)	ATTACH	ATTACH	ATTACH	ATTACH	ATTACH	ATTACH
Property Depreciation Schedules (see tax return)	ATTACH	ATTACH	ATTACH	ATTACH	ATTACH	ATTACH
Copy Of Most Recent Mortgage Statement-s	ATTACH	ATTACH	ATTACH	ATTACH	ATTACH	ATTACH
Capital Improvements Last 3 Years (list and \$ amount)	ATTACH	ATTACH	ATTACH	ATTACH	ATTACH	ATTACH

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