



Springfield Board of Assessors
36 Court Street Rm. 09
Springfield, MA 01103

Patrick Greenhalgh, Chairman
Jessica Guerra
Matthew Fontaine

Parcel ID:
Property Location:
Land Use Code:

April 1, 2022

VERY IMPORTANT: REQUEST FOR INFORMATION

Please Submit the Postcard with this Submission

FAILURE TO COMPLY SHALL RESULT IN A PENALTY OF \$50 FOR CLASS ONE \$250 FOR CLASS THREE AND FOUR PROPERTIES. IN ADDITION YOU MAY LOSE THE RIGHT TO AN APPEAL AT THE APPELLATE TAX BOARD

The Board of Assessors is responsible for determining the assessed value of your property. M.G.L c. 59 § 38D provides the assessors with the authority to request information “as may reasonably be required ...to determine the actual fair cash valuation” of your property. We are requesting your cooperation pursuant to this law. **Failure to comply with our request shall result in a penalty of \$50 for class one \$250 for class three and four properties added to your tax bill. In addition, you may lose your right to appeal at the Appellate Tax Board.** This penalty is authorized by state law. Please note that M.G.L. c. 59, § 52B protects the information provided from public disclosure and limits narrowly the public officials who may view it. The requested information must be returned within sixty (60) days of this mailing or no later than **May 31, 2022**.

Please provide the information by one or more of the following two options:

1. Complete the enclosed form for the entire calendar year **2021**, and return to the Assessors office by **May 31, 2022**;

OR;

2. Provide a copy of the entire calendar **2021** operating statement for the property, or a profit and loss statement, in whatever format you use. Please also include a copy of the calendar year **2021** rent roll as of **1/1/2022**.

You can mail all requested documents to the address listed in the top right corner of this page or email to **assessors_email@springfieldcityhall.com**. If you have any questions, please feel free to call the Assessors office at **(413) 886-5002**.

LUC:		City of Springfield FY 2023 Mixed Use Property Income Statement MUST BE RETURNED by May 31, 2022 to: Assessors Office, 36 Court St, Springfield MA 01103 or emailed to assessors_email@springfieldcityhall.com									
Mailed : April 1, 2022		FOR ASSESSORS USE ONLY							Loc: Parcel:		Name: Phone: Email:
Owner Name: Business Name:											
Please provide the following information AS IT RELATES TO YOUR PROPERTY. Use additional sheets if necessary. If you prefer to use your own computer rent roll or spreadsheets, please use this format as a guide. FOR MORE INFORMATION OR TO ANSWER QUESTIONS, PLEASE CALL 413-886-5002.											
Provide the following income information for the property during calendar year 1/1/2021 through 12/31/2021 for FY 2023											
COMMERCIAL LEASE INFORMATION:											
Tenant Name	Floor Level	Sprinkler Y/N	Use Type	Leased Area (Sq Ft)	Rent Per Sq. Ft.	Annual Base Rent	Start Date (Month/Yr.)	End Date (Month/Yr.)	Term in Years	Gross, Net or NNN	
						\$					
						\$					
						\$					
						\$					
Vacant Space					Vacant Area	Asking Rent					
						\$					
RESIDENTIAL LEASE INFORMATION:											
					Incentives						
Unit Type	Floor Level	Total # of Units	Rent per Month	Annual Rent	Free Rent (if applicable)	Free # of Months	Start Date (Month/Yr.)	End Date (Month/Yr.)	Heat Included (Y/N)	Electric Included (Y/N)	
Studio Units											
One Bedroom Units											
Two Bedroom Units											
Three or more Bedrooms											
CALENDAR YEAR INCOME SUMMARY											
Total POTENTIAL Gross Income (Including Vacant Space)		Total Rent Concessions	Total Vacancies	Total Collection Loss	Total Parking Income	Total Laundry/Vending Income	Other Income (Billboard, Cell Tower, etc.)		Total Rent Collected		
\$		\$	\$	\$	\$	\$	\$		\$		

Pursuant to Mass. General Laws, Chap. 59 Section 38D, this form **MUST** be completed and returned to the Assessors Office within 60 days of mailing.

Failure to comply shall result in a penalty of \$50 for class one \$250 for class three and four properties. In addition, you may lose the right to an appeal at the Appellate Tax Board.

SEE REVERSE SIDE FOR EXPENSE INFORMATION

Provide the following expense information AS IT RELATES TO THE REAL ESTATE ONLY during calendar year **1/1/2021 through 12/31/2021 for FY 2022**

Location:	Parcel:	EXPENSES FOR CALENDAR YEAR 2021 (FY2023)			
Management of Real Estate Only			Maintenance & Cleaning (Recurring)		
	Landlord Amount	Tenant Amount		Landlord Amount	Tenant Amount
Management Wages or Fees	\$	\$	Wages	\$	\$
Legal & Accounting	\$	\$	Supplies	\$	\$
Security Wages	\$	\$	Maint. Service Contract Fee	\$	\$
Payroll	\$	\$	Grounds Keeping	\$	\$
Group Insurance	\$	\$	Rubbish Removal	\$	\$
Telephone	\$	\$	Snow Removal	\$	\$
Advertising	\$	\$	Exterminator	\$	\$
Commissions	\$	\$	Other (Explain)	\$	\$
Other (Explain)	\$	\$		\$	\$
TOTAL	\$	\$	TOTAL	\$	\$

Repairs & Alterations (Nonroutine)			Capital Improvements (Major Projects)		
Exterior	\$	\$	Describe Project(s):	\$	\$
Interior	\$	\$		\$	\$
Mechanical	\$	\$		\$	\$
Electrical	\$	\$		\$	\$
Plumbing	\$	\$		\$	\$
Other (Explain)	\$	\$		\$	\$
TOTAL	\$	\$	TOTAL	\$	\$

Utilities			Other Expenses		
Electrical	\$	\$	Real Estate Taxes	\$	\$
Gas	\$	\$	Reserve for Replacement	\$	\$
Oil	\$	\$	Apartments for Employees	\$	\$
Water/Sewer	\$	\$	Insurance (1yr. Premium)	\$	\$
Other (Explain)	\$	\$	Other <u>(Explain)</u>	\$	\$
TOTAL	\$	\$	TOTAL	\$	\$

Additional Comments:

I declare that to the best of my knowledge and belief, this return is true, correct and complete.

Signature of Owner/Taxpayer/Agent

Print Name

Mailing Address

*This document MUST be signed and
dated to be deemed as valid*

Telephone Day

Email

Date

*Failure to file this within 60 days of its mailing shall
result in a \$50.00 for class one \$250 for class three and
four properties penalty. In addition, you may lose the
right to an appeal at the
Appellate Tax Board.*



Board of Assessors
36 Court Street
Springfield, MA 01103
Telephone (413) 787-3111
Facsimile (413) 787-7721

City of Springfield, Massachusetts
April 1, 2022

Parcel ID:

Parcel Location:

We are writing with respect to the purchase of **mixed use** property on <<sale date>> in the amount of \$ <<sale price>>. To help us gain an overall understanding of market conditions, we would like to verify the terms of the sale. We hope you understand that the sale is of great importance to us and receiving the enclosed form back from you will assist us in developing fair and equitable assessments for Fiscal Year **2023** for all parcels in the City.

State law, Chapter 59 Section 38D, provides the assessors with the authority to request information "as may reasonably be required ...to determine the actual fair cash valuation" of your property. We are requesting your cooperation pursuant to this law. **Failure to comply with our request shall result in a penalty of \$50 for class one \$250 for class three and four properties added to your tax bill. In addition, you may lose your right to appeal at the Appellate Tax Board.** This penalty is authorized by state law.

Kindly provide the information pertaining to your purchase based on the factors specified in the enclosed form. Please pay particular attention to answering the questions regarding the terms of sale, sale price, property other than real estate included in sale price, and any other real estate parcels which may have been included in the total sale price. Please provide any additional details about the transaction that you consider relevant. If necessary, please attach a separate sheet. If the parcel is rented at arm's length, please provide a copy of the current rent roll and a current income and expense statement as it relates to the rental of the real estate. If you own and occupy the space, please note OWNER-OCCUPIED on the form.

If you have any questions please call **Patrick Greenhalgh directly at (413) 886-5002**. Please mail the form back to the Assessors Office 36 Court Street Springfield, MA 01103 within 60 days by **May 31, 2022**. You may also send via email to **assessors_email@springfieldcityhall.com**. Your time and effort is greatly appreciated!



Board of Assessors
36 Court Street
Springfield, MA 01103
Telephone (413) 787-6092
Facsimile (413) 787-7721

City of Springfield, Massachusetts Sales Verification Form Commercial/Industrial – FY 2023

April 1, 2022

Parcel:

Property Location:

Pursuant to M.G.L. c. 59 § 38D, please answer the following questions:

1. Any special circumstances affecting the sale:

- ☐ Sale between immediate family members
Please specify the relationship _____
- ☐ Sale involved corporate affiliates belonging to the same parent company
- ☐ Sale of convenience (correct defects in title; create joint or common tenancy, etc.)
- ☐ Auction
- ☐ Foreclosure
- ☐ Sale of estate from Executor or Executrix
- ☐ Sale involved in a religious, charitable, benevolent organization
- ☐ Sale in which the seller provided financing
- ☐ Sale of only a partial interest in the real estate
- ☐ Sale involved in a trade or exchange of properties
- ☐ Short sale i.e. sale price less than seller's loan balance
- ☐ Other, please state _____

2. Were any other parcels involved in the sale? If yes, please list the addresses or parcel ID's

3. How many apartment units?

- ☐ Studio _____
- ☐ 1 Bedroom _____
- ☐ 2 Bedroom _____
- ☐ 3 Bedroom _____
- ☐ 4 Bedroom _____

4. Was the property leased or rented at the time of the sale? If yes, what percent of the units were leased or rented? _____

5. Any recent changes to the property before or after the sale? Yes No

- ☐ New Construction
- ☐ Remodeling
- ☐ Demolition
- ☐ Addition

What was the estimated cost of the labor & materials
\$ _____

6. Was there an appraisal made on the property?

- ☐ Yes, what was the value? \$ _____
- ☐ No

7. Were any delinquent taxes assumed by the purchaser?

- ☐ Yes – What amount was included in the purchase
\$ _____
- ☐ No

8. How was the property marketed? (choose all that apply)

- ☐ Listed with an agent
- ☐ Advertised online
- ☐ Displayed "For Sale" sign
- ☐ Offered by word of mouth
- ☐ Other, please state _____

9. Was the property available to other potential purchasers?

- ☐ Yes
- ☐ No, please explain: _____

10. How long was the property on the market?

11. What was the asking price? \$ _____

12. Any seller obligations? _____

13. What was the total sale price? \$ _____

14. Was the sale influenced by any unusual circumstances?

- ☐ Yes, please explain _____

- ☐ No

15. Is the total sale price a fair reflection of the market value for the real estate on the sale date?

- ☐ Yes
- ☐ No – If no, please explain _____

Please sign below:

Print name: _____

Title: _____

Signature: _____

Phone number: _____

Email address: _____

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