



Marsha M. Faux, CFA, ASA
 Polk County Property Appraiser
INCOME/EXPENSE ANALYSIS: CONGREGATE CARE
 (For Calendar Year 1/1/2020 through 12/31/2020)
REAL ESTATE DIVISION

BUSINESS NAME: _____
PROPERTY LOCATION: _____

PARCEL ID: _____

	AL	IL	MC	SN	TOTAL
TOTAL LIVING UNITS					
TOTAL OCCUPANTS/BEDS					

AVG. OCCUPANCY % 2019 _____ %
 AVG. OCCUPANCY % 2020 _____ %

INCOME:

AL RENTAL INCOME \$ _____
 IL RENTAL INCOME \$ _____
 AL SERVICES INCOME ** \$ _____
 MC RENTAL/CARE \$ _____
 INCOME OTHER INCOME \$ _____

TOTAL INCOME \$ _____

EXPENSES:

PROGRAM/ACTIVITIES \$ _____
 NURSING EXPENSE \$ _____
 FOOD SERVICE EXP. \$ _____
 HOUSEKEEPING-LAUNDRY \$ _____
 MAINTENANCE \$ _____
 SALES-MARKETING \$ _____
 UTILITIES \$ _____
 ADMINISTRATIVE/GEN \$ _____
 INSURANCE \$ _____
 PROPERTY TAXES \$ _____
 MANAGEMENT FEE \$ _____
 OTHER \$ _____

TOTAL EXPENSES: \$ _____

NET OPERATING INCOME \$ _____

**** PLEASE INDICATE IF AL SERVICES REVENUE IS ALREADY INCLUDED IN THE AL RENTAL INCOME**

AL = ASSISTED LIVING
IL = INDEPENDENT LIVING
MC = MEMORY CARE
SN = SKILLED NURSING



Marsha M. Faux, CFA, ASA
 Polk County Property Appraiser
INCOME/EXPENSE ANALYSIS: CONGREGATE CARE
(For Calendar Year 1/1/2020 through 12/31/2020)
REAL ESTATE DIVISION

PARCEL ID: _____

	# SEMI-PRIVATE	STUDIO	1BR	2BR-1 BA	2BR-2BA	3BR
# UNITS ASSISTED LIVING (AL)						
# UNITS INDEPENDENT LIVING (IL)						
# UNITS/BEDS MEMORY CARE (MC)						
# UNITS/BEDS SKILLED NURSING (SN)						
MKT RATE/PREMIUM RANGE AL						
MARKET RATE IL						
MARKET RATE MC						
AVG. DAILY BLENDED RATE SN						

MISCELLANEOUS INFORMATION:	
ARE THERE ADDITIONAL UNITS? IF YES PLEASE EXPLAIN.	_____
ARE THERE PLANS FOR CONSTRUCTION OF NEW UNITS?	_____
IF YES, WHEN WILL THE CONSTRUCTION BEGIN?	_____
ESTIMATED COST OF CONSTRUCTION.	\$ _____
WHAT IS THE DATE OF THE LAST SIGNIFICANT RENOVATION?	_____
IF NONE RECENTLY, ARE THERE FUTURE PLANS IN PLACE?	_____
MORTGAGE	\$ _____
INTEREST	_____ %
DEPRECIATION	\$ _____
OTHER	\$ _____

SIGNATURE/TITLE _____
DATE _____ **TELEPHONE #** _____
EMAIL ADDRESS _____