

CITY OF WORCESTER,
MASSACHUSETTS

Edward M. Augustus
City Manager



William J. Ford, IAO AAS
City Assessor

Administration and Finance
Division of Assessing

RE: REQUEST FOR INFORMATION
Massachusetts General Laws, chapter 59, Section 38D

Dear Sir or Madam:

The assessor is required to assess all property at its full and fair cash value as of January 1, 2018, for fiscal year 2019. The collection and analysis of calendar year 2017 rental data of income-producing properties is essential in the development of a fair and equitable valuation of your property and comparable properties. The information requested is for the assessor's use. It is not a public record (G.L. c. 59, Sec. 52B).

The assessor's authority to request this information is granted in G.L. c. 59, Sec. 38D, which states:

A board of assessors may request the owner or lessee of any real property to make a written return under oath within sixty days containing such information as may reasonably be required by it to determine the actual fair cash valuation of such property.

Failure of an owner or lessee of real property to comply with such request within 60 days after it has been made by the board of assessors shall be automatic grounds for dismissal of a filing at the appellate tax board. The appellate tax board and the county commissioners shall not grant extensions for the purposes of extending the filing requirements unless the applicant was unable to comply with such request for reasons beyond his control or unless he attempted to comply in good faith. If any owner or lessee of real property in a return made under this section makes any statement which he knows to be false in a material particular, such false statement shall bar him from any statutory appeal under this chapter.

If an owner or lessee of real property fails to submit the information within the time and in the form prescribed, the owner shall be assessed an additional penalty for the next ensuing tax year in the amount of up to \$250 but only if the board of assessors informed the owner or lessee that failure to submit such information would result in the penalty.

Please file the completed return, signed under oath, to the Assessor, City Hall, 455 Main Street, Worcester, MA 01608, within 60 days, that is, not later than April 2, 2018. Report only typical expenses, if a major repair was performed (i.e. roof replacement) do not report the full cost in one year. **Massachusetts law states that failure to respond timely and accurately to this request within sixty (60) days of the postmarked date will cause you to lose your right to appeal your assessment. Further, you will be assessed an additional amount of up to \$250 on your 2019 tax bill.**

If you have any questions related to the questionnaire, or the valuation of your property, you may direct them to John Valade at {508} 799-1869. Please respond as soon as possible, but not later than April 2, 2018 to avoid any added penalty.

Sincerely,

William J. Ford, A.A.S., City Assessor
City of Worcester

| | | |
|---------------------------|--------------------------------|----------------------------------------------|
| Property Location: | Apartment Property | City of Worcester – Fiscal Year 2019 |
| Parcel ID (MBL): | Rental Income Statement | Calendar Yr. 2017 for January 1, 2018 |

PLEASE COMPLETE GRID OR ATTACH RENT ROLL WITH SAME INFORMATION:

| Occupancy Information: | | | | | | | | |
|-------------------------------|-----------------------|---------------|----------------------|--------------|-------------|-----------------|-----------------------------|---------|
| Floor Level | # Bedrooms/ #Baths | Heat (Y/N) | Electricity (Y/N) | Monthly Rent | Annual Rent | Lease Or TAW | Furnished or Unfurnished | Parking |
| | | | | \$ | \$ | | | |
| | | | | \$ | \$ | | | |
| | | | | \$ | \$ | | | |
| | | | | \$ | \$ | | | |
| | | | | \$ | \$ | | | |
| | | | | \$ | \$ | | | |
| | | | | \$ | \$ | | | |
| | | | | \$ | \$ | | | |
| | | | | \$ | \$ | | | |
| | | | | \$ | \$ | | | |

| <i>Property Breakdown</i> | # of Units | Avg. Monthly Rent | Owner/Family Occupied? (Y/N) | <i>Parking Information</i> | Total # of Spaces | Single Space Monthly | | |
|---------------------------|---------------|----------------------|---------------------------------|--------------------------------|----------------------|-------------------------|---------------------------------|--|
| Studio | | \$ | | Indoor | | \$ | Percent Owner Occupied ____% | |
| One | | \$ | | Outdoor | | \$ | Owner Occupied Area _____Sq.ft. | |
| Two | | \$ | | Total: | | | | |
| Three | | \$ | | Comments: | | | | |
| Four | | \$ | | | | | | |
| Total # of Units: | | | | | | | | |
| Total # Vacant Jan1 | | | | | | | | |

Calendar Year Income Summary

| Total Potential Gross Income | Total Concessions | Total Vacancies | Total Collection Loss | Total Parking Income | Total Other Income (Laundry, Vending, Etc.) | Total Rent Collected |
|---------------------------------|----------------------|--------------------|--------------------------|-------------------------|------------------------------------------------|-------------------------|
| \$ | (\$) | (\$) | (\$) | \$ | \$ | \$ |

Annual Expenses

| (Expenses for Calendar Year: 2017) | | | | | |
|------------------------------------|-----------------|---------------|----------------------------------|-----------------|---------------|
| City of Worcester | Landlord Amount | Tenant Amount | | Landlord Amount | Tenant Amount |
| Management & Administrative | | | Maintenance & Cleaning | | |
| Management Wages or Fee | \$ | \$ | Wages | \$ | \$ |
| Legal & Accounting | \$ | \$ | Supplies | \$ | \$ |
| Security Wages | \$ | \$ | Maint. Service Contract Fee | \$ | \$ |
| Payroll | \$ | \$ | Grounds Keeping | \$ | \$ |
| Group Insurance | \$ | \$ | Rubbish Removal | \$ | \$ |
| Telephone | \$ | \$ | Snow Removal | \$ | \$ |
| Advertising | \$ | \$ | Exterminator | \$ | \$ |
| Commissions | \$ | \$ | Other | \$ | \$ |
| Other | \$ | \$ | | \$ | \$ |
| Total | \$ | \$ | Total | \$ | \$ |
| Repairs & Alterations (Maint.) | | | Capital Improvements | | |
| Exterior | \$ | \$ | Description: | | |
| Interior | \$ | \$ | | \$ | \$ |
| Mechanical | \$ | \$ | | \$ | \$ |
| Electrical | \$ | \$ | | \$ | \$ |
| Plumbing | \$ | \$ | Total | \$ | \$ |
| Total | \$ | \$ | Tenant Build-Out | \$ | \$ |
| Utilities | | | Other Expenses | | |
| Electricity | \$ | \$ | Real Estate Taxes | \$ | \$ |
| Gas | \$ | \$ | Reserve for Replacement | \$ | \$ |
| Oil | \$ | \$ | Apartments for Employees | \$ | \$ |
| Water | \$ | \$ | Property Insurance (1 yr. Prem.) | \$ | \$ |
| Sewer | \$ | \$ | | \$ | \$ |
| Total | \$ | \$ | Total | \$ | \$ |
| Comments: | | | | | |

I certify under the pains and penalties of perjury that the information supplied herewith is true and correct:

Signature: _____ **Print Name:** _____ **Date:** _____ **Phone:** _____