



May TBD, 2024

RE: REQUEST FOR INFORMATION

Dear Sir or Madam:

The Assessor is required to assess all property at its full and fair cash value as of January 1, 2024, for Fiscal Year 2025. The collection and analysis of calendar year 2023 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 M.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 Assessing Division, City Hall, 455 Main Street, Room 209, Worcester, MA 01608, within 60 days, that is, not later than **Friday July TBD, 2024**. 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 Fiscal Year 2025 tax bill.**

If you have any questions related to the questionnaire, or the valuation of your property, you may direct them to me at (508) 799-1024. Please respond as soon as possible, but **not later than Friday July TBD, 2024 to avoid any added penalty.**

Regards,

Samuel E. Konieczny, MAA

City Assessor

PID:		LUC:	
Property Loc.:		Mixed Use Property	City of Worcester FY2025 (For Calendar Year 2023)
Parcel ID (MBL):		Rental Income Statement	Assessment as of: January 1, 2024

Commercial Lease Information: Please provide information on current leases as of January 1, 2024

					Lease Terms			
Floor Level	Tenant Name	Type of Space	Leased Area (Sq. Ft.)	Rent per SF on Jan. 1st	Annual Rent	Start Date (Mo/Yr)	Term in years	Basis Gross, Net, NNN
				\$	\$			
				\$	\$			
				\$	\$			
				\$	\$			
				\$	\$			
				\$	\$			
				\$	\$			
				\$	\$			
				\$	\$			

Percent Owner Occupied _____% Owner Occupied Area _____ Sq. Ft.

Residential Rental Information: Please provide the following rental information.

The effective reporting date is January 1, 2023				Rent Incentives		Lease Terms			
Unit Type	Total # of Units	Rent per Month	Annual Rent	Free Rent	Free # of Months	Lease Start Date (Mo/Yr)	Heat Incl. (Y/N)	Elect. Incl. (Y/N)	Lease/TAW or Owner/Fam.
Studio		\$		\$					
		\$		\$					
One Bedroom		\$		\$					
		\$		\$					
Two Bedroom		\$		\$					
		\$		\$					
Three Bedroom		\$		\$					
		\$		\$					
Four Bedroom		\$		\$					
		\$		\$					
Weekly		\$		\$					
		\$		\$					

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

Submitted by: _____ Title: _____ Phone:_____

Signature: _____ Date: _____

PID:

Annual Expenses

		(Expenses for Calendar Year: 2023)			
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: _____