## PROSPECTIVE LESSEE QUESTIONNAIRE AND REQUEST FOR FINANCIALS

Commercial Real Estate Services for the Southern San Joaquin Valley

Please complete IN FULL and submit to: Olivieri Commercial Group, Inc.

9810 Brimhall Road Bakersfield, CA 93312 661.327.1200ph 661.327.1221fx

Please do not leave any questions unanswered. This form does not obligate either party to the performance of a contract for leasehold property. It is solely for information and does not constitute an offer to lease property or any negotiation for such purpose.

APPLICANT #1	APPLICANT #2
Name	Name
Home Phone	Home Phone
Mobile	Mobile
Email	Email
Date of Birth Marital Status	Date of Birth
Social Security No	Social Security No
Present Address	Present Address
City, State, Zip	City, State, Zip
No. of YearsOwnRent	No. of Years Own Rent
(if less than 2 years at present address)	(if less than 2 years at present address)
Former Address	Former Address
City, State, Zip	City, State, Zip
Driver's License No(attach copy)	Driver's License No(attach copy)
APPLICANT #1 - EMPLOYMENT INFORMATION	APPLICANT #2 - EMPLOYMENT INFORMATION
Name of Employer	Name of Employer
Employer Address	Employer Address
City, State, Zip	City, State, Zip
Type of Business	Type of Business
Position or Title	Position or Title
Years Employed	Years Employed
Work Phone	Work Phone

## **Proposed Business Information**

Whose name will the lease be under?			
Is the proposed business individually owned, a corporation, a partnership?			
If a partnership, list names of all partners:			
If a corporation, list state of incorporation and federal I	.D.#		
What kind of business do you propose to operate in the	space?		
Is the proposed business a start-up or existing business	?		
If existing, relocation? Multiple?	# of Stores		
Have you operated a similar business in the past?			
How will you operate your new business at the propose	ed location? Who will manage? How many employees		
will you have?			
Describe your anticipated start-up operating expenses a	and list amount:		
Tenant Improvements	\$		
Inventory	\$		
Equipment	\$		
Payroll	\$		
Insurance	\$		
Advertising \$			
Other	\$		
TOTAL START-UP EXPENSES	\$		
How will you pay for your start-up expenses (cash, bus	iness loan, etc.)?		

Please provide a five-year projected income and expense statement for the proposed business.

REVENUES	Year 1	Year 2	Year 3	
Gross Income				
(Per square foot of leased space)				
Cost of goods sold				
Gross Profit				
Expenses				
Accounting/Professional				
Advertising				
Equipment Lease				
Insurance				
Maintenance & Repair				
Payroll - Wages & Taxes				
Rent				
Taxes				
Utilities				
Total Expenses:				
Net Profit:				
Do you have any other comments or informat	ion which yo	ou feel the landl	ord should tal	ke into consideration in
evaluating your proposed store or restaurant?				
DI I				
Please attach a resume on your business exper	rience.			

ASSETS		LIABILITIES	
Cash in Banks – see schedule	\$	Notes Payable to Banks – Secured	\$
U.S. Gov. Securities – see schedule	\$	Notes Payable to Banks - Unsecured	\$
Listed Securities – see schedule	\$	Notes Payable to Relatives	\$
Unlisted Securities – see schedule	\$	Notes Payable to others	\$
Accounts and Notes Receivable	\$	Accounts and Bills due	\$
Due from relatives and friends	\$	Unpaid Income Tax	\$
Accounts and Notes Receivable	\$	Other unpaid taxes and interest	\$
Due from others- good	\$	Real Estate Mortgages	
Accounts and Notes Receivable	\$	Payable – see schedule	\$
Doubtful	\$	Chattel Mortgages and other	
Real Estate Owned – see schedule	\$	Liens Payable	\$
Real Estate Mortgages Receivable	\$	Other debts – itemize	\$
Automobiles	\$		\$
Other Personal Property	\$		\$
Other assets – Itemize	\$		\$
	\$		\$
	\$		\$
	\$	TOTAL LIABILITIES	\$
	\$	NET WORTH	\$
TOTAL ASSETS	\$	TOTAL LIABILITIES & NET WORTH	\$
SOURCES OF INCOME		CONTINGENT LIABILITIES	
SOURCES OF INCOME Salary	\$	CONTINGENT LIABILITIES  As endorser, co-maker or guarantor	\$
	\$ \$		\$ \$
Salary		As endorser, co-maker or guarantor	\$
Salary Bonus and Commissions	\$	As endorser, co-maker or guarantor On leases or contracts Legal claims	\$ \$
Salary Bonus and Commissions Dividends	\$ \$	As endorser, co-maker or guarantor On leases or contracts Legal claims	\$ \$
Salary Bonus and Commissions Dividends Real Estate Income	\$ \$ \$	As endorser, co-maker or guarantor On leases or contracts Legal claims Provisions for Federal Income Taxes	\$ \$ \$
Salary Bonus and Commissions Dividends Real Estate Income Other Income – Itemize	\$\$ \$\$ \$\$	As endorser, co-maker or guarantor On leases or contracts Legal claims Provisions for Federal Income Taxes Other special debt	\$ \$ \$
Salary Bonus and Commissions Dividends Real Estate Income Other Income – Itemize TOTAL INCOME	\$\$ \$\$ \$\$ GENERAL	As endorser, co-maker or guarantor On leases or contracts Legal claims Provisions for Federal Income Taxes Other special debt TOTAL CONTINGENT LIAIBILITIES	\$\$ \$\$ \$\$
Salary Bonus and Commissions Dividends Real Estate Income Other Income – Itemize TOTAL INCOME  Are any assets pledged? – see sched	\$\$ \$\$ \$\$ GENERAL	As endorser, co-maker or guarantor On leases or contracts Legal claims Provisions for Federal Income Taxes Other special debt TOTAL CONTINGENT LIAIBILITIES	\$
Salary Bonus and Commissions Dividends Real Estate Income Other Income – Itemize TOTAL INCOME  Are any assets pledged? – see sched Are you a defendant in any suits or l	\$\$ \$\$ \$\$  GENERAL  uleegal actions?	As endorser, co-maker or guarantor On leases or contracts Legal claims Provisions for Federal Income Taxes Other special debt TOTAL CONTINGENT LIAIBILITIES	\$\$ \$\$ \$\$

or face value (bonds)		Description			In Name of	Market Value
S	CHEDULE	OF REAL E	STATE MO	ORTGAGES R	ECEIVABLE	
Description of Property Covered				Amount	In Name of	Maturity
		CHEDULE O	FREALE	STATE OWNE	D	
Description of Property	Date	Title in	Cost	Market Value		rtgage
And Improvements	Acquired	Name of			Amount	Maturity
SCHEDULE OF	LIFE INSU	RANCE CARR	RIED, INCL	UDING N.S. L. I	AND GROUP I	NSURANCE
Amount	Name	of Company	В	eneficiary	Cash Surrender	Loans
		SCHEDULE	OF ASSE	TS PLEDGED		
Description		Value		To Whom Pledge	d	
	DERC	SITS WITH BA	NKS OF C	OTHER INSTITU	ITIONS	
Institution Name	DLFC	Location	ANNO ON C	Account Type	Balance	Account Number
mondation Name		Location		Account Type	Dalarice	Account Number
GIVE NAMES C	F BANKS	OR FINANCE	COMPANIE	S WHERE CRE	DIT HAS BEEN	OBTAINED
Institution Name		Location		Date	High Credit	Basis
				+		

SCHEDULE OF U.S. GOVERNMENTS, STOCKS, and BONDS OWNED

In Name of

Market Value

Description

No. of shares

## **DECLARATION**

The undersigned declare that this information is true and correct to the best of their knowledge. Each of the undersigned hereby authorizes the Landlord and/or Owner, Olivieri Commercial Group, Inc. and its agents to review their credit history and to contact any and all references listed above (and any other sources deemed appropriate by management) for additional credit information.

The	undersigned	understand	that additional	information	may be re	equired v	which co	ould incl	ude, b	ut is not	t limited
to, l	palance shee	ts and incon	ne statements, j	proformas, ta	x returns	and busi	iness pla	ıns.			

Print Name:	Print Name:
Signature:	Signature: