

2021 RENTAL HOUSING FINANCE SURVEY (RHFS) ITEMS BOOKLET

Sponsored By:



DPINTRO

Description: Survey Introduction

Welcome to the 2021 Rental Housing Finance Survey (RHFS).

The purpose of the RHFS is to learn about the financial health of rental properties. We have randomly selected the address listed above to be included in the 2021 RHFS. Due to the scientifically random selection process, we only know that the address listed above is a rental property or is part of a rental property.

OWNCITY2, OWNSTATE2

Description: Contact Information

A. Please provide your contact information.

Name: Not on PUF
Title: Not on PUF
Email: Not on PUF
Phone: Not on PUF
Street Address: Not on PUF
City: Not on PUF
State: Not on PUF
Zip: Not on PUF

OWNMAN

Description: Are you currently the owner or manager?

- B. Are you currently the owner, manager, or acting on behalf of the owner/manager of this rental property?
1. Yes
 2. No
-

OWNCITY, OWNSTATE

Description: Current Owner or Manager Contact information

- C. Please provide the name, address, and telephone number of the current owner, manager, or corporate office of this rental property.

Name: Not on PUF
Title: Not on PUF
Email: Not on PUF
Organization: Not on PUF
Street Address: Not on PUF
City: Not on PUF
State: Not on PUF
Zip: Not on PUF
Phone: Not on PUF

RENTAL

Description: Is this a rental property?

1. Is the property at this address a rental property?

Include properties that are rented or vacant but available for rent.

1. Yes
 2. No
-

PROPPUB

Description: Operated by a public housing authority?

- 1a. Is this rental property operated by a public housing authority?

1. Yes
 2. No
-

PROPMH

Description: Part of a manufactured housing community?

- 1b. Is this rental property part of a manufactured housing community (manufactured/mobile homes)?
1. Yes
 2. No
-

PROPTOWN

Description: A series of townhomes or row houses?

- 1c. Is this rental property a series of townhomes or row houses?
1. Yes
 2. No
-

DPPROPID

Description: Rental property description

DP_1. The following series of questions is designed to help define the number of units, buildings and addresses for the rental property associated with the address listed above.

For the purposes of this survey, we define your rental property as:

The building at the address above and any other buildings under the same first mortgage

Or

The building at the address above and any other buildings that are collectively owned as a single entity

Which of the following best describes your rental property?

1. The rental property is composed of a single residential building located at the address above
2. The rental property is composed of multiple residential buildings that are all located at the address above

3. The rental property is composed of multiple residential buildings at multiple addresses that includes the building(s) at the address above
4. Other

DPNUMADDR

Description: Total number of addresses

DP_2. Thinking about the ENTIRE rental property, how many addresses are at this rental property? Include the property address indicated above in your total. Do not include unit designations as separate addresses. Examples of unit designations include “APT 101” or “#2”.

____ Total Addresses

Not on PUF

Description: Property Identification Upload Document

DP_3. To accurately represent your rental property we need to collect all of the addresses, buildings and residential units at your rental property.

Please upload a document containing all of the addresses, the number of buildings at each address, and the number of residential units within each building.

Your document will be encrypted and uploaded to a secure server.

(Example)

Address 1

Building 1

Number of Units

Building 2

Number of Units

Address 2

Building 1

Number of Units

Building 2

Number of Units

Building 3

Number of Units

DPTOTBLDGSV

Description: Total Number of Residential Buildings Verification

DP_4V. According to public records, the entire rental property associated with the address above has a total of {insert total residential buildings from public records or 2018 RHFS data}.

Is this correct?

Include all residential buildings intended for occupancy. Exclude model homes.

1. Yes
2. No

NUMBLD_R

Description: Total number of residential buildings

DP_4. Thinking about the ENTIRE rental property, how many residential buildings are at the rental property associated with the address above?

Include all residential buildings intended for occupancy. Exclude model homes.

____ Total Buildings

Not on PUF

Description: Property Addresses

DP_5. Please provide the addresses and the number of buildings at each address for this rental property.

Include all residential buildings intended for occupancy. Exclude model homes.

Street Address: Not on PUF

City: Not on PUF

State: Not on PUF

ZIP Code: Not on PUF

Number of buildings at this address: Not on PUF

NUMUNITS_R

Description: Total Units Verification

DP_6V. According to public records, the entire rental property associated with the address above has a total of {insert number of units in the buildings from public records or 2018 RHFS data} residential units.

Is this correct?

Include units that are rented, available for rent, and occupied by the owner or property personnel. Exclude model units, stores, and office space.

A residential unit may be a house, an apartment, a condominium unit, a manufactured home, etc., that is considered to be separate living quarters. Separate living quarters are those in which the occupants live separately from any other individuals in the building and have direct access from outside the building or through a common hall.

1. Yes
2. No

NUMUNITS_R

Description: Number of units in buildings

DP_6. How many units are in each building at this address?

Include units that are rented, available for rent, and occupied by the owner or property personnel. Exclude model units, stores, and office space.

A residential unit may be a house, an apartment, a condominium unit, a manufactured home, etc., that is considered to be separate living quarters. Separate living quarters are those in which the occupants live separately from any other individuals in the building and have direct access from outside the building or through a common hall.

- ____ Units in Building 1
- ____ Units in Building 2
- ____ Units in Building 3
- ____ Units in Building 4
- ____ Units in Building 5+

DPTOTUNITSV

Description: Total Units Verification

DP_7V. According to public records, the entire rental property associated with the address above has a total of {insert total number of units from public records or 2018 RHFS data} residential units.

Is this correct?

Include units that are rented, available for rent, and occupied by the owner or property personnel. Exclude model units, stores, and office space.

A residential unit may be a house, an apartment, a condominium unit, a manufactured home, etc., that is considered to be separate living quarters. Separate living quarters are those in which the occupants live separately from any other individuals in the building and have direct access from outside the building or through a common hall.

1. Yes
2. No

DPTOTUNITS

Description: Total number of residential units

DP_7. Thinking about the ENTIRE rental property, how many residential units are at the rental property associated with the address above?

Include units that are rented, available for rent, and occupied by the owner or property personnel. Exclude model units, stores, and office space.

A residential unit may be a house, an apartment, a condominium unit, a manufactured home, etc., that is considered to be separate living quarters. Separate living quarters are those in which the occupants live separately from any other individuals in the building and have direct access from outside the building or through a common hall.

_____ Total Units

NURSING, ASSIST, INDEP

Description: Services Available (See Table)

DP_8. Does this rental property include residential units that are considered –

A nursing home? (**NURSING**)

These units are for people who receive constant supervision in a residential care home setting, a lot of help with all or most activities of daily living, or 24-hour nursing care.

1. Yes
2. No
3. Don't Know

An Assisted Living facility? (**ASSIST**)

These units are for people who receive help with one or more activities of daily living in residential care homes. These activities may include bathing, getting dressed, toileting, grooming and medication management but 24-hour nursing care is NOT needed.

1. Yes
2. No
3. Don't Know

A SENIOR Independent Living community? (**INDEP**)

These units are for seniors who can no longer maintain their private homes but are still independent in many ways. Housekeeping services and/or meals may be included services. These communities often have social activities and sometimes, off-site trips.

1. Yes
 2. No
 3. Don't Know
-

NUMNURS, NUMASST, NUMIND

Description: Number of Units Receiving Services (See Table)

DP_9. Of the total units you reported, how many units:

	Number of Units
Receive nursing care services? (NUMNURS)	
Receive assisted living services? (NUMASST)	
Are considered as SENIOR Independent Living? (NUMIND)	
Total of NUMNURS, NUMASST, NUMIND) TOTASST	

UNITSTAT

Description: Status of single unit

2. Is this unit rented, vacant-for rent, occupied by owner or property personnel, or vacant for other reasons?
1. Rented
 2. Vacant-for rent
 3. Occupied by owner or property personnel
 4. Vacant for other reasons

YROLDBLG_R

Description: Year oldest building constructed, verification

- 3aV. According to public records, we have recorded that the oldest residential building was constructed in {insert year from public records or 2018 RHFS data }

Is this correct?

1. Yes
 2. No
-

YROLDBLG_R

Description: Year oldest building constructed

3a. In what year was the oldest residential building on this rental property constructed?

___ ___ ___ ___ YEAR

YRNEWBLG_R

Description: Year newest building constructed, verification

3bV. According to public records, we have recorded that the most recent residential building on this rental property was constructed in {insert year from public records or 2018 RHFS data}

Is this correct?

1. Yes
 2. No
-

YRNEWBLG_R

Description: Year most recent building constructed

3b. In what year was the most recent residential building on this rental property constructed?

___ ___ ___ ___ YEAR

HOWACQ

Description: How property was acquired

4. Which one of the following best describes how you acquired the property?

“Substantial rehabilitation” means the renovation, alteration or remodeling of a building containing essentially uninhabitable residential rental units that require substantial renovation in order to conform to contemporary standards for decent, safe, and sanitary housing. Substantial rehabilitation may vary in degree from gutting and extensive reconstruction to extensive improvements that cure substantial deferred maintenance. Cosmetic improvements alone such as painting, decorating and minor repairs, or other

work which can be performed safely without having the units vacated, do not qualify as substantial rehabilitation.

1. I purchased the land then proceeded to develop new residential building(s) (including razing existing structures on the land).
2. I purchased the property in a condition that required capital investments to perform substantial rehabilitation of the residential building(s) so as to make them suitable for the rental market.
3. I purchased the property in a condition that did not require substantial rehabilitation to make it suitable for the target rental market.

YRPROPACQ_R

Description: Year property acquired by owner

- 4a. In what year was this rental property acquired (if original owner, report year construction was completed)?

___ ___ ___ YEAR

PURPRICE_R

Description: Purchase price

- 4b. What was the purchase price of this rental property?

\$		.00
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CASHDWN

Description: Cash down payment

- 4b1. Did you make a cash down payment when you purchased this rental property?

1. Yes
2. No

CASHDWNAMT

Description: Cash down amount

4b2. How much was the cash down payment when you purchased this rental property?

\$		.00
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MRKTVAL_R

Description: Current market value

4c. What do you believe is the current market value of this rental property?

\$		.00
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HOWMVAL

Description: Basis for current market value

4d. Which of the following best reflects how you determined your estimate of the current market value?

1. Local tax assessment of this property
2. Recent real estate appraisal
3. Insurance replacement cost
4. Original purchase price plus inflation
5. Original purchase price plus improvements and inflation
6. Selling or asking price of similar properties in area
7. Capitalization of current rental revenues
8. Other

VARIABLE NAMES:

Table: Variable names are displayed in the table.

BROOMSV

BROOMS

Description: Number of units by occupancy status – for multi-units (2+ units)

Number of units rented, vacant for rent, occupied by property owner, occupied by property personnel, and vacant for other reasons.

TOTRENTVAC: Total number of units for rent or vacant-for rent

BROOMSV: Number of bedrooms verification for single units

BROOMS: Number of bedrooms for single units

5. Of the residential units reported, how many belong to each of the following categories?

	Efficiency or studio (no bedrooms)	1 bedroom	2 bedrooms	3 or more bedrooms	Total
a. Rented	Not on PUF	Not on PUF	Not on PUF	Not on PUF	TRENOC_R
b. Vacant-for rent	Not on PUF	Not on PUF	Not on PUF	Not on PUF	TRENVAR
c. Occupied by the property owner	Not on PUF	Not on PUF	Not on PUF	Not on PUF	TOWNOC_R
d. Occupied by property personnel	Not on PUF	Not on PUF	Not on PUF	Not on PUF	TEMPOC_R
e. Vacant for other reasons	Not on PUF	Not on PUF	Not on PUF	Not on PUF	TOTHVAR
Total residential units	TO_BED0 Not on PUF	T0_BED1 Not on PUF	TO_BED2 Not on PUF	TO_BED3 Not on PUF	TOBEDT Not on PUF

Or

According to public records, we have recorded (*reported from other source*) bedroom for this residential unit? Is this correct?

1. Yes
2. No **BROOMSV**

Or

How many bedrooms are in this residential unit?

___ Bedrooms **BROOMS**

LOWRENT

Description: Lowest asking rent

5a. What is the lowest monthly rent, including asking rent, for vacant units?

If Section 8 vouchers are received, record the amount of rent that is received by the owner, i.e., rent plus the voucher amount.

\$		.00
----	--	-----

HIRENT

Description: Highest asking rent

5b. What is the highest monthly rent, including asking rent, for vacant units?

\$		.00
----	--	-----

If Section 8 vouchers are received, record the amount of rent that is received by the owner, i.e., rent plus the voucher amount.

VARIABLE NAMES:

RENT

Table: Variable names are displayed in the table.

Description:

RENT: Monthly rent for single units

Table for 2+ units: Rented or vacant for rent units offered at each level of rent per month.

6. What is the rent per month?

\$		.00
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 RENT

Or

Of the residential units identified as RENTED OR VACANT-FOR RENT, how many are offered at each level of rent per month?

	Efficiency or studio (no bedrooms)	1 bedroom	2 bedrooms	3 or more bedrooms	Total
No rent	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENTNO_R
\$1 - \$249	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENTLT249_R
\$250 - \$274	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT274_R
\$275 - \$299	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT299_R
\$300 - \$349	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT349_R
\$350 - \$399	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT399_R
\$400 - \$449	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT449_R
\$450 - \$499	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT499_R
\$500 - \$549	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT549_R
\$550 - \$599	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT599_R
\$600 - \$649	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT649_R
\$650 - \$699	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT699_R
\$700 - \$749	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT749_R
\$750 - \$799	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT799_R
\$800 - \$899	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT899_R
\$900 - \$999	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT999_R
\$1,000 - \$1,099	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT1099_R
\$1,100 - \$1,249	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT1249_R
\$1,250 - \$1,499	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT1499_R
\$1,500 - \$1,999	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT1999_R
\$2,000 - \$2,499	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT2499_R
\$2,500 - \$2,999	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT2999_R
\$3,000 - \$3,499	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT3499_R
\$3,500 - \$3,999	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT3999_R
\$4,000 - \$4,499	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT4499_R
\$4,500 - \$4,999	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT4999_R
\$5,000 or more	Not on PUF	Not on PUF	Not on PUF	Not on PUF	RENT5000_R
	BED0_R	BED1_R	BED2_R	BED3_R	

LEASING

Description: Single Unit – Lease length

6a. Thinking about the typical lease length for this home, would you describe it as...

1. Long term (6 months or longer)
 2. Short term (2 – 6 months)
 3. Weekly
-

WEEKLNG

Description: Short-Term Daily/Weekly Lease Rental Availability

6b. Are any of your apartments made available as daily or weekly rentals?

1. Yes
 2. No
-

WEEKLNGNUM

Description: Short-Term Daily/Weekly Lease Rental Unit Count

6c. How many of your apartments are made available as daily or weekly rentals?

____ Units

WEEKLNGPCT

Description: Short-Term Daily/Weekly Lease Rental Percent

6d. Approximately how many of your apartments are available for daily or weekly rental?

1. Less than 10 percent
 2. 10 – 25 percent
 3. Greater than 25 percent
-

CONCSS

Description: Rent concessions

7a. Rent concessions are rent discounts offered by landlords to encourage new tenants to sign a lease. Do not include concessions or discounts for renewing a lease.

If a tenant rented one of the residential units today, what is the equivalent value of the rent concessions that you would be willing to offer to new tenants?

1. No rent concessions
 2. Less than 1 month's rent
 3. 1 month's rent
 4. Greater than 1 month's rent
-

CONCSSNUM

Description: Number of current tenants getting rent concessions

- 7b. How many current residential units received rent concessions as part of their current lease?

_____ Units

SENIOR

Description: Age restricted development

8. Are these buildings in a development that is age restricted?

1. Yes
 2. No
-

RCONTROL, RCONTROLAHS

Description:

RCONTROL: Number of units that are rent controlled

RCONTROLAHS: Residential unit is rent controlled

9. Rent control or rent stabilization refers to laws or ordinances, not related to subsidy programs, that set maximum rental charges for residential housing.

Of the residential units, how many are subject to rent control or stabilization?

_____ Units **RCONTROL**

Or

Is this residential unit subject to rent control or stabilization?

1. Yes **RCONTROLAHS**
 2. No
-

OFFSTPARK, OFFSTPARKAHS

Description:

OFFSTPARK: Number of off-street parking spaces

OFFSTPARKAHS: Has off-street parking spaces

10. How many parking spaces are associated with the rental property?

Include all surface parking lots and garages.

_____ Spaces **OFFSTPARK**

Or

Is there a driveway or other space available for private parking?

1. Yes
 2. No
- OFFSTPARKAHS**

IELEC, IGAS, IWATER, ISEWER

Description: Electricity/Gas, Fuel Oil/Water/Sewer utility as part of rent

11a. Are the following utilities included or not included in the rent?

Report for the MAJORITY of the buildings if the rental property contains several buildings with a mix of responses.

Report "Not included in rent" if the utility is billed to the renter but not included in the rent previously reported.

	Included in rent	Not included in rent	Not Available
Electricity IELEC			
Gas/Fuel oil IGAS			
Water IWATER			
Sewer ISEWER			

ICABLE, IWIFI, IPOOL, IPARKING

Description: Cable of satellite TV/Internet or WiFi/Swimming pool/Parking amenity included in the rent

11b. Are the following amenities included or not included in the rent?

Report for the MAJORITY of the buildings if the rental property contains several buildings with a mix of responses.

Report "Not included in rent" if the amenity is billed to the renter but not included in the rent previously reported.

	Included in rent	Not included in rent	Not Available
Cable or Satellite ICABLE			
Internet or WiFi IWIFI			
Swimming pool IPOOL			
Off-street parking IPARKING			

PROPANS

Description: Able to answer income and expenses questions for 2020

11c. You indicated that you purchased the rental property in 2020. Are you able to answer questions about the total income and expenses during 2020?

1. Yes
2. No

TOTCOLL

Description: Total rent collected during calendar year 2020

12a. What was the total amount collected from rent for all residential housing units on this rental property during calendar year 2020?

\$		.00
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COMMSPACE

Description: Commercial use space

13. Some rental properties receive income from commercial uses of the property. Examples include:

Rental income from nonresidential units or space such as a store or doctor's office

Rental income from rooftop cellular towers

Rental income from advertisement signage attached to the building

Is there any space specified for commercial uses on this rental property (do not include rental/management office)?

1. Yes
 2. No
-

RECOMMREN

Description: Receive net rental income from commercial use

- 14b. During calendar year 2020, did this rental property receive rental income from a commercial use of the property (do not include rental/management office)?

1. Yes
 2. No
-

COMMRENT

Description: Total receipts from commercial rent

- 14c. How much income did you receive from the commercial use of this rental property?

\$		.00
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MNGMNT

Description: Responsible for day-to-day management

15a. Who has the responsibility for the day-to-day management of this rental property?
Select only ONE response.

1. Property owner or unpaid agent of owner (such as a family member)
2. Management agent directly employed by owner
3. Management company
4. Other

HRSMNGMNT

Description: Hours owner spends on day-to-day management

15b. On a monthly basis, how many hours does the owner (or owner agent) spend in the management of this rental property?

_____ Hours

ADVERTISE

Description: Use of Advertising

15c. Before your current tenant moved into this home, did you advertise this home as available for rent?

1. Yes
2. No

ADWEBSITE, ADONLINE, ADOTHONLINE, ADNEWSPAPER, ADAGENCY, ADAGENT

Description: Advertising Methods

15d. We are interested in how you advertise apartments that are available for rent. Please answer yes or no to the following questions. Which of the following methods are used to advertise apartments that are available for rent?

	Yes	No	Don't Know
A website dedicated solely to your rental property? ADWEBSITE			
Online real-estate classifieds (Craigslist, Apartment.com, Realtor.com, Zillow, etc.)? ADONLINE			
Other online advertisement (using a method such as Search Engine Marketing (SEM), Social Media Advertising, Banners)? ADOTHONLINE			
A newspaper or other print publication, such as an apartment guide? ADNEWSPAPER			
An apartment rental agency listing? ADAGENCY			
A real estate agent? ADAGENT			

MLS

Description: Advertised on MLS (Multiple Listing Service)

15e. Some houses listed with a real estate agent are placed on the Multiple Listing Service, or MLS for short. Was your home placed on the Multiple Listing Service (MLS)?

1. Yes
2. No
3. Don't know

VARIABLE NAMES: Variable names are displayed in the table.

Description: Operating expenses incurred at this property

16. For this survey:

An operating expense is an expenditure that a business incurs in the course of performing normal business operations, such as, funds spent to maintain the rental property which may include repairs, services to maintain the rental property, taxes, and insurance.

A capital improvement is considered to be the addition of a permanent structural improvement, or the restoration of some aspect of a rental property, that will either enhance the rental property's overall value or increase its useful life.

This next question asks about the operating expenses.

In calendar year 2020, how much did you spend on each of the following operating expenses for this rental property (do not include capital improvements)?

		Yearly Cost	Or	Not Applicable
Payroll costs for employees hired directly by owner OPPAY	\$		.00	
Real estate property taxes OPTAX_R				
Insurance OPINSUR				
Electric/ Gas/ Fuel Oil OPELGAS				
Water/Sewer OPWTRSWR				
Maintenance and repairs OPREP				
Management company OPMNG				
Other professional services (legal, accounting) OPROTH				
Security OPSECUR				
Grounds/ landscaping OPLAND				
Any other operating expenses OPOTHEX				
Total Operating Expenses OPEX_R	\$		.00	

VARIABLE NAMES:

Table: Variable names are displayed in the table.

CAPEX_R

Description:

Table: Capital improvements or upgrades/replacements made at this property

CAPEX_R: Total costs for your capital expenditures

17. The next question asks about the costs associated with any capital improvements.

A capital improvement is considered to be the addition of a permanent structural improvement, or the restoration of some aspect of a rental property, that will either enhance the rental property's overall value or increase its useful life.

Exclude any amount spent on maintenance and repairs that was already reported.

During calendar year 2020, were any of the following capital improvements or upgrades/replacements made at this residential rental property? If so, what were their associated costs?

				Associated Cost		Or	Not Applicable
1.	Heating or air conditioning system CPHEATAMT	1. Yes 2. No	\$		.00		
2.	Roof CPRFAMT	1. Yes 2. No					
3.	Windows CPWINAMT	1. Yes 2. No					
4.	Doors CPDOORAMT	1. Yes 2. No					
5.	Flooring/carpeting CPFLRAMT	1. Yes 2. No					
6.	Exterior CPEXTAMT	1. Yes 2. No					
7.	Plumbing system CPPLBAMT	1. Yes 2. No					
8.	Electrical System CPELEAMT	1. Yes 2. No					
9.	Kitchen facilities CPKITAMT	1. Yes 2. No					
10.	Bathroom facilities CPBATAMT	1. Yes 2. No					
11.	Handicapped/universal access CPACCAMT	1. Yes 2. No					
12.	All other capital improvements or updates CPOTHAMT	1. Yes 2. No					
Total capital improvement Expenses (calculated and not entered by respondent) CAPEX_R							

Or

Please enter the total costs for your capital expenditures. Please estimate if you do not have actual amounts available.

Costs		
Total costs for capital expenditures CAPEX_R	\$	.00

CPRESAMT_R

Description: Estimated Capital Reserves Balance

17a. What is the estimated capital reserves balance for this rental property?

A capital reserve is an account that includes accumulated retained earning not paid out to equity investors that can be used to pay for expenses, foreseen and unforeseen, or to offset capital losses.

\$		.00
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OWNENT

Description: Current ownership entity

18. How would you best describe the current ownership entity?

1. Individual investor, including joint ownership by two or more individuals, such as a married couple
2. Trustee for estate
3. LLP, LP, or LLC
4. Tenant in common
5. General partnership
6. Real Estate Investment Trust (REIT)
7. Real estate corporation
8. Housing cooperative organization or stock cooperative
9. Nonprofit organization (including religious institution, labor union, or fraternal organization)
10. Other kind of institution

SUBSIDY

Description: HUD rental subsidy

19a. Tenants have HUD Subsidy

HUD provides rental subsidies for low-income tenants through a variety of programs, including the Housing Choice (Section 8) Voucher program and Section 8 Housing Assistance Payments (HAP).

Do any of the units or tenants receive HUD rental subsidies?

1. Yes
2. No
3. Don't know

SUBSIDYNUM

Description: Number of HUD rental subsidy

19b. How many units receive a HUD rental subsidy or are occupied by a tenant who receives a HUD rental subsidy?

_____ Units

GOVBELOW, RSUBSIDY, ELDERLY, GOVGRANT, BENEOTH

Description: Government benefits received as a result of owning rental property

22. Does this rental property benefit from any of the following FEDERAL Programs?

	Yes	No	Don't Know
A federal government-sponsored, below-market interest rate loan GOVBELOW			
A federal government rental subsidy OTHER than Section 8 payments to project or tenants RSUBSIDY			
Housing for the elderly direct loan program (Section 202) ELDERLY			
A government grant (HOME, CDBG, HOPE VI) GOVGRANT			
Other federal benefit BENEOTH			

LOWINCTC

Description: Low-Income Housing Tax Credit Program Benefit

22a1. Does this rental property benefit from the FEDERAL Low-Income Housing Tax Credit Program (Section 42)?

1. Yes
 2. No
 3. Don't know
-

LIHTCUNITS

Description: Number of Units Receiving Low-Income Housing Tax Credit Program Benefit

22a2. How many units are income-restricted under the FEDERAL Low-Income Housing Tax Credit?

_____ Units

STLOWINC

Description: State Benefits Received

22b. Does this rental property benefit from State Low-Income Housing Tax Credit?

1. Yes
 2. No
 3. Don't know
-

HISTORIC, LOWINCTEN, LOWINAREA, ECONDEVLP, OTHRCV

Description: Real estate tax reductions, abatements, or refunds received on this rental property

23. For calendar year 2020, have any LOCAL real estate tax reductions, abatements, or refunds been received on this rental property for any of the following reasons?

	Yes	No	Don't Know
For historic preservation HISTORIC			
Because this rental property houses low-income tenants LOWINCTEN			
Because this rental property is in a low-income area LOWINAREA			
Because this rental property is in a targeted economic development area ECONDEVLP			
For some other reason OTHRCV			

MORT_INTRO

The following section will ask about debt(s) on this rental property. This includes:

- A mortgage, deed of trust, or trust deed (including mortgages and refinanced mortgages that are backed by multifamily bond financing)
- A contract to purchase, land contract, or purchase agreement
- A home equity line of credit (HELOC) secured by this rental property or a home equity loan
- Some other loan secured by this rental property (do not include personal loans or consumer finance loans)

Please estimate if you do not have actual amounts available.

DEBT

Description: Property has mortgage or similar debt

- 24a. Is there a mortgage or similar debt on this rental property? Include mortgages that are backed by bond financing.

1. Yes
 2. No
-

WHYNOMRT

Description: Why no mortgage or debt

24b. Why is there no mortgage or similar debt on this rental property?

1. I do not need a mortgage at this time
 2. I have tried to get a mortgage, but was denied
 3. Other
-

DEBTNUM

Description: Number of mortgages or similar debts

24c. How many mortgages or similar debts are on this rental property?

_____ Mortgages or similar debts

DEBT1/ DEBT2/ DEBT3/ DEBT4

Description: Debt 1 type/Debt 2 type/Debt 3 type/Debt 4 type

25. For the purposes of this survey, we will be asking about your first four debts on this rental property.

Is the first debt (**DEBT1**) –

1. A mortgage, deed of trust, or trust deed (including mortgages and refinanced mortgages that are backed by multifamily bond financing)?
2. A contract to purchase, land contract, or purchase agreement?
3. A home equity line of credit (HELOC) or a home equity loan, secured by this rental property?
4. Some other loan secured by this rental property (not personal loans or consumer finance loans)?

Is the second debt (**DEBT2**) –

1. A mortgage, deed of trust, or trust deed (including mortgages and refinanced mortgages that are backed by multifamily bond financing)?
2. A contract to purchase, land contract, or purchase agreement?

3. A home equity line of credit (HELOC) or a home equity loan, secured by this rental property?
4. Some other loan secured by this rental property (not personal loans or consumer finance loans)?

Is the third debt **(DEBT3)** –

1. A mortgage, deed of trust, or trust deed (including mortgages and refinanced mortgages that are backed by multifamily bond financing)?
2. A contract to purchase, land contract, or purchase agreement?
3. A home equity line of credit (HELOC) or a home equity loan, secured by this rental property?
4. Some other loan secured by this rental property (not personal loans or consumer finance loans)?

Is the fourth debt **(DEBT4)** –

1. A mortgage, deed of trust, or trust deed (including mortgages and refinanced mortgages that are backed by multifamily bond financing)?
2. A contract to purchase, land contract, or purchase agreement?
3. A home equity line of credit (HELOC) or a home equity loan, secured by this rental property?
4. Some other loan secured by this rental property (not personal loans or consumer finance loans)?

Items 27 – 36 will cycle through up to four times depending on the number of debts or similar mortgages recorded in item 24c above. DEBT type is defined in Item 25 above.

YRMORT_R (Not on PUF)

Description: Year mortgage placed – 1st debt, recode

27a_1. When did [DEBT1 type] on this rental property originate?

___ ___ ___ ___ YEAR

MORTAMT (Not on PUF)**Description:** Amount of original loan – 1st debt, rounded

27b_1. What was the original amount on [DEBT1 type]?

\$		.00
----	--	-----

OUTBAL (Not on PUF)**Description:** Outstanding balance – 1st debt, rounded

27d_1. What is the outstanding balance on [DEBT1 type]?

\$		.00
----	--	-----

LNCRDTAMT (Not on PUF)**Description:** Amount of HELOC or line of credit – 1st debt, rounded

27e_1. How much was the HELOC or the home equity loan originally for?

\$		.00
----	--	-----

LNCRDTBAL (Not on PUF)**Description:** Line of credit balance – 1st debt, rounded

27f_1. What is the current balance on the HELOC or the home equity loan?

\$		.00
----	--	-----

APPVAL (Not on PUF)**Description:** Original value at time of debt – 1st debt, rounded

27g_1. What was the original value of this rental property at the time of [DEBT1 type]'s origination?

\$		.00
----	--	-----

MORTKIND

Description: Kind of current debt – 1st debt

28_1. Is [DEBT1 type] on this rental property

1. A new mortgage that was placed when this property was acquired?
 2. A refinancing of a previous loan?
 3. A mortgage placed on a property previously owned free and clear of debt?
 4. A construction loan converted to permanent financing?
 5. The same mortgage that was assumed from the previous owner when this property was acquired?
-

MORTGET (Not on PUF)

Description: Where debt obtained – 1st debt

29_1. Where did you get [DEBT1 type] on this rental property?

1. Commercial bank or trust company
 2. Savings and loan association, federal savings bank, mutual savings bank
 3. Life insurance company
 4. Mortgage bank or mortgage company
 5. Credit union
 6. Finance company (including consumer discount company, industrial bank, cooperative bank)
 7. State or municipal government
 8. State or local housing finance agency
 9. Individual or individual's estate
 10. Other – Specify _____
 11. Don't know
-

TERM

Description: Term of loan – 1st debt

31a_1. What is the term of the loan on this rental property's [DEBT1 type]?
____ Years

LOCTYP

Description: Line of credit or home equity loan – 1st debt

35aSCRN_1. Is this [DEBT1 type] a –

1. Home equity line of credit (HELOC)?
 2. Home equity loan?
-

REGPAY

Description: Regular required payments – 1st debt

35a_1. Are there regularly required payments on this rental property's [DEBT1 type]?

1. Yes
 2. No
-

PMTAMT (Not on PUF)

Description: Amount of regular required payment – 1st debt

35b_1. For this rental property's [DEBT1 type] what was the amount of the most recent regularly required payment, including tax and insurance, if required?

\$		.00
----	--	-----

PMTFREQ (Not on PUF)

Description: Frequency of regular payment – 1st debt

35c_1. For this rental property's [DEBT1 type], how often are these payments required to be made?

1. Biweekly (every 2 weeks)
 2. Monthly
 3. Quarterly
 4. Other
-

RPIPRIN, RPIINT, RPIPRPINS, RPIPMI, RPIPRPTAX

Description: Regular payment includes principal, interest, property insurance, PMI, property taxes on debt – 1st debt

35d_1. For this rental property's [DEBT1 type] what does this regular payment include?

Principal **RPIPRIN**

1. Yes
2. No
3. Don't know

Interest **RPIINT**

1. Yes
2. No
3. Don't know

Property insurance **RPIPRPINS**

1. Yes
2. No
3. Don't know

Private mortgage insurance (PMI) **RIPMI**

1. Yes
2. No
3. Don't know

Property taxes **RPIPRPTAX**

1. Yes
2. No
3. Don't know

YRMORT2_R (Not on PUF)

Description: Year debt placed/assumed – 2nd debt, recode

27a_2. When did [DEBT2 type] on this rental property originate?

__ __ __ __ YEAR

MORTAMT2 (Not on PUF)**Description:** Amount of original loan – 2nd debt, rounded

27b_2. What was the original amount on [DEBT2 type]?

\$		.00
----	--	-----

OUTBAL2 (Not on PUF)**Description:** Outstanding balance – 2nd debt, rounded

27d_2. What is the outstanding balance on [DEBT2 type]?

\$		.00
----	--	-----

LNCRTAMT2 (Not on PUF)**Description:** Amount of HELOC or line of credit – 2nd debt, rounded

27e_2. How much was the HELOC or the home equity loan originally for?

\$		.00
----	--	-----

LNCRTBAL2 (Not on PUF)**Description:** Line of credit balance – 2nd debt, rounded

27f_2. What is the current balance on the HELOC or the home equity loan?

\$		.00
----	--	-----

APPVAL2 (Not on PUF)**Description:** Original value at time of debt – 2nd debt, rounded

27g_2. What was the original value of this rental property at the time of [DEBT2 type]'s origination?

\$		.00
----	--	-----

MORTKIND2

Description: Kind of current debt – 2nd debt

28_2. Is [DEBT2 type] on this rental property

1. A new mortgage that was placed when this property was acquired?
 2. A refinancing of a previous loan?
 3. A mortgage placed on a property previously owned free and clear of debt?
 4. A construction loan converted to permanent financing?
 5. The same mortgage that was assumed from the previous owner when this property was acquired?
-

MORTGET2 (Not on PUF)

Description: Where debt obtained – 2nd debt

29_2. Where did you get [DEBT2 type] on this rental property?

1. Commercial bank or trust company
 2. Savings and loan association, federal savings bank, mutual savings bank
 3. Life insurance company
 4. Mortgage bank or mortgage company
 5. Credit union
 6. Finance company (including consumer discount company, industrial bank, cooperative bank)
 7. State or municipal government
 8. State or local housing finance agency
 9. Individual or individual's estate
 10. Other – Specify _____
 11. Don't know
-

TERM2

Description: Term of loan – 2nd debt

31a_2. What is the term of the loan on this rental property's [DEBT2 type]?
____ Years

LOCTYP2

Description: Line of credit or home equity loan – 2nd debt

35aSCRN_2. Is this [DEBT2 type] a –

1. Home equity line of credit (HELOC)?
 2. Home equity loan?
-

REGPAY2

Description: Regular required payments – 2nd debt

35a_2. Are there regularly required payments on this rental property's [DEBT2 type]?

1. Yes
 2. No
-

PMTAMT2 (Not on PUF)

Description: Amount of regular required payment – 2nd debt

35b_2. For this rental property's [DEBT2 type] what was the amount of the most recent regularly required payment, including tax and insurance, if required?

\$		.00
----	--	-----

PMTFREQ2 (Not on PUF)

Description: Frequency of regular payment – 2nd debt

35c_2. For this rental property's [DEBT2 type], how often are these payments required to be made?

1. Biweekly (every 2 weeks)
 2. Monthly
 3. Quarterly
 4. Other
-

RPIPRIN2, RPIINT2, RPIPRPINS2, RPIPMI2, RPIPRPTAX2

Description: Regular payment includes principal, interest, property insurance, PMI, property taxes on debt – 2nd debt

35d_2. For this rental property's [DEBT2 type] what does this regular payment include?

Principal **RPIPRIN2**

1. Yes
2. No
3. Don't know

Interest **RPIINT2**

1. Yes
2. No
3. Don't know

Property insurance **RPIPRPINS2**

1. Yes
2. No
3. Don't know

Private mortgage insurance (PMI) **RIPMI2**

1. Yes
2. No
3. Don't know

Property taxes **RPIPRPTAX2**

1. Yes
2. No
3. Don't know

YRMORT3_R (Not on PUF)

Description: Year debt placed/assumed – 3rd debt, recode

27a_3. When did [DEBT3 type] on this rental property originate?

__ __ __ __ YEAR

MORTAMT3 (Not on PUF)**Description:** Amount of original loan – 3rd debt, rounded

27b_3. What was the original amount on [DEBT3 type]?

\$		.00
----	--	-----

OUTBAL3 (Not on PUF)**Description:** Outstanding balance – 3rd debt, rounded

27d_3. What is the outstanding balance on [DEBT3 type]?

\$		.00
----	--	-----

LNCRTAMT3 (Not on PUF)**Description:** Amount of HELOC or line of credit – 3rd debt, rounded

27e_3. How much was the HELOC or the home equity loan originally for?

\$		.00
----	--	-----

LNCRTBAL3 (Not on PUF)**Description:** Line of credit balance – 3rd debt, rounded

27f_3. What is the current balance on the HELOC or the home equity loan?

\$		.00
----	--	-----

APPVAL3 (Not on PUF)**Description:** Original value at time of debt – 3rd debt, rounded

27g_3. What was the original value of this rental property at the time of [DEBT3 type]'s origination?

\$		.00
----	--	-----

MORTKIND3

Description: Kind of current debt – 3rd debt

28_3. Is [DEBT3 type] on this rental property

1. A new mortgage that was placed when this property was acquired?
 2. A refinancing of a previous loan?
 3. A mortgage placed on a property previously owned free and clear of debt?
 4. A construction loan converted to permanent financing?
 5. The same mortgage that was assumed from the previous owner when this property was acquired?
-

MORTGET3 (Not on PUF)

Description: Where debt obtained – 3rd debt

29_3. Where did you get [DEBT3 type] on this rental property?

1. Commercial bank or trust company
 2. Savings and loan association, federal savings bank, mutual savings bank
 3. Life insurance company
 4. Mortgage bank or mortgage company
 5. Credit union
 6. Finance company (including consumer discount company, industrial bank, cooperative bank)
 7. State or municipal government
 8. State or local housing finance agency
 9. Individual or individual's estate
 10. Other – Specify _____
 11. Don't know
-

TERM3

Description: Term of loan – 3rd debt

31a_3. What is the term of the loan on this rental property's [DEBT3 type]?
____ Years

LOCTYP3

Description: Line of credit or home equity loan – 3rd debt

35aSCRN_3. Is this [DEBT3 type] a –

1. Home equity line of credit (HELOC)?
 2. Home equity loan?
-

REGPAY3

Description: Regular required payments – 3rd debt

35a_3. Are there regularly required payments on this rental property's [DEBT3 type]?

1. Yes
 2. No
-

PMTAMT3 (Not on PUF)

Description: Amount of regular required payment – 3rd debt

35b_3. For this rental property's [DEBT3 type] what was the amount of the most recent regularly required payment, including tax and insurance, if required?

\$		.00
----	--	-----

PMTFREQ3 (Not on PUF)

Description: Frequency of regular payment – 3rd debt

35c_3. For this rental property's [DEBT3 type], how often are these payments required to be made?

1. Biweekly (every 2 weeks)
 2. Monthly
 3. Quarterly
 4. Other
-

RPIPRIN3, RPIINT3, RPIPRPINS3, RPIPMI3, RPIPRPTAX3

Description: Regular payment includes principal, interest, property insurance, PMI, property taxes on debt – 3rd debt

35d_3. For this rental property's [DEBT3 type] what does this regular payment include?

Principal **RPIPRIN3**

1. Yes
2. No
3. Don't know

Interest **RPIINT3**

1. Yes
2. No
3. Don't know

Property insurance **RPIPRPINS3**

1. Yes
2. No
3. Don't know

Private mortgage insurance (PMI) **RIPMI3**

1. Yes
2. No
3. Don't know

Property taxes **RPIPRPTAX3**

1. Yes
2. No
3. Don't know

YRMORT4_R (Not on PUF)

Description: Year debt placed/assumed – 4th debt, recode

27a_4. When did [DEBT4 type] on this rental property originate?

__ __ __ __ YEAR

MORTAMT4 (Not on PUF)**Description:** Amount of original loan – 4th debt, rounded

27b_4. What was the original amount on [DEBT4 type]?

\$		.00
----	--	-----

OUTBAL4 (Not on PUF)**Description:** Outstanding balance – 4th debt, rounded

27d_4. What is the outstanding balance on [DEBT4 type]?

\$		.00
----	--	-----

LNCRDTAMT4 (Not on PUF)**Description:** Amount of HELOC or line of credit – 4th debt, rounded

27e_4. How much was the HELOC or the home equity loan originally for?

\$		.00
----	--	-----

LNCRDTBAL4 (Not on PUF)**Description:** Line of credit balance – 4th debt, rounded

27f_4. What is the current balance on the HELOC or the home equity loan?

\$		.00
----	--	-----

APPVAL4 (Not on PUF)**Description:** Original value at time of debt – 4th debt, rounded

27g_4. What was the original value of this rental property at the time of [DEBT4 type]'s origination?

\$		.00
----	--	-----

MORTKIND4

Description: Kind of current debt – 4th debt

28_4. Is [DEBT4 type] on this rental property

1. A new mortgage that was placed when this property was acquired?
 2. A refinancing of a previous loan?
 3. A mortgage placed on a property previously owned free and clear of debt?
 4. A construction loan converted to permanent financing?
 5. The same mortgage that was assumed from the previous owner when this property was acquired?
-

MORTGET4 (Not on PUF)

Description: Where debt obtained – 4th debt

29_4. Where did you get [DEBT4 type] on this rental property?

1. Commercial bank or trust company
 2. Savings and loan association, federal savings bank, mutual savings bank
 3. Life insurance company
 4. Mortgage bank or mortgage company
 5. Credit union
 6. Finance company (including consumer discount company, industrial bank, cooperative bank)
 7. State or municipal government
 8. State or local housing finance agency
 9. Individual or individual's estate
 10. Other – Specify _____
 11. Don't know
-

TERM4

Description: Term of loan – 4th debt

31a_4. What is the term of the loan on this rental property's [DEBT4 type]?
____ Years

LOCTYP4

Description: Line of credit or home equity loan – 4th debt

35aSCRN_4. Is this [DEBT4 type] a –

1. Home equity line of credit (HELOC)?
 2. Home equity loan?
-

REGPAY4

Description: Regular required payments – 4th debt

35a_4. Are there regularly required payments on this rental property's [DEBT4 type]?

1. Yes
 2. No
-

PMTAMT4 (Not on PUF)

Description: Amount of regular required payment – 4th debt

35b_4. For this rental property's [DEBT4 type] what was the amount of the most recent regularly required payment, including tax and insurance, if required?

\$		.00
----	--	-----

PMTFREQ4 (Not on PUF)

Description: Frequency of regular payment – 4th debt

35c_4. For this rental property's [DEBT4 type], how often are these payments required to be made?

1. Biweekly (every 2 weeks)
 2. Monthly
 3. Quarterly
 4. Other
-

RPIPRIN4, RPIINT4, RPIPRPINS4, RPIPMI4, RPIPRPTAX4

Description: Regular payment includes principal, interest, property insurance, PMI, property taxes on debt – 4th debt

35d_4. For this rental property's [DEBT4 type] what does this regular payment include?

Principal **RPIPRIN4**

1. Yes
2. No
3. Don't know

Interest **RPIINT4**

1. Yes
2. No
3. Don't know

Property insurance **RPIPRPINS4**

1. Yes
2. No
3. Don't know

Private mortgage insurance (PMI) **RIPMI4**

1. Yes
2. No
3. Don't know

Property taxes **RPIPRPTAX4**

1. Yes
2. No
3. Don't know

ACCEPT

Description: HUD Vouchers

37. Has this property rented to a tenant with a HUD voucher in the past?

1. Yes
2. No
3. Don't know