



TENANT REAL ESTATE PLAN QUESTIONNAIRE





CLIENT

NAME:

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DATE:

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INSTRUCTIONS

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COMPANY CONTACTS

President/CEO

Name

Address

City/St/Zip

Email

Main Phone

Direct Line

Cell

Birthday

Spouse

Children

Assistant

Chief Financial Officer

Name

Address

City/St/Zip

Email

Main Phone

Direct Line

Cell

Birthday

Spouse

Children

Assistant

Chief Operations Officer/Controller

Name

Address

City/St/Zip

Email

Main Phone

Direct Line

Cell

Birthday

Spouse

Children

Assistant

Director of Corporate Real Estate

Name

Address

City/St/Zip

Email

Main Phone

Direct Line

Cell

Birthday

Spouse

Children

Assistant

Human Resources/Office Manager

Name

Address

City/St/Zip

Email

Main Phone

Direct Line

Cell

Birthday

Spouse

Children

Assistant

IT Manager

Name

Address

City/St/Zip

Email

Main Phone

Direct Line

Cell

Birthday

Spouse

Children

Assistant



COMPANY ASSETS

Company Revenue

- Less than 1,000,000
- 1,000,000 - 5,000,000
- 5,000,000 - 10,000,000
- 10,000,000 - 20,000,000
- 20,000,000 +

Annual Growth

- 0 - 5%
- 5% - 15%
- 15% - 30%
- 30% - 45%
- 45%

Company Classification?

- Incorporated
- LLC
- S-Corp
- Company
- Other

Financials available to Landlord

Company Incorporated in What State

Company's Fiscal Year

Accountant Name

Years in Business

Banking Institution Name

Company's Competition



CURRENT FACILITIES

How many square feet do you occupy?

How long have you been in your current building?

What has been your growth for the last 5 years?

How many employees do you currently have?

How many cubicles do you have?

How many offices do you have?

Does the current space handle all of your storage/file needs?

What building amenities do you have?

How many parking stalls do you currently use?

What is the cost, if any, per stall?

How many employees use public transportation?

Bicycle?

Do you have a conference room? Yes No

If yes, how many?

How many people need to be accommodated in the conference room?

Do you have a kitchen? Yes No

If yes, how big?

Do you have any special technical/power requirements in your current space?

If yes, describe:

When does your current lease expire?

What is your current rental rate?

Is your lease full service or triple net?

Considering your current space, what features do you like the most?

What features do you dislike the most?



FUTURE FACILITIES NEEDS

Who will be making the decision?

Is renewing the lease at your current space an option?

Is relocating within your existing building an option?

How many employees will your company be adding over the next 5 years?

1-10

10-20

20-30

30-40

40-50

50 +

In the Vancouver / Portland Metro area, where are you most interested in locating?

Do you prefer to lease or buy?

Lease

Buy

Build

All of the above

How long of a lease would be ideal?

1-3 years

3-5 years

5-7 years

10 years

10 +

Other considerations:



FUTURE REAL ESTATE

Is there a good time in your business cycle to move?

1st Quarter

2nd Quarter

3rd Quarter

4th Quarter

When lease expires

Does everyone need to be on the same floor?

Yes / No

Does everyone need to be in the same building?

Yes / No

Does your company have special telecommunications needs? Yes No

If yes, please explain

Existing relationship with a teleco who provides data, wiring & telephone hookup? Yes No

If so, name:

Does your company have special power needs? Yes No

If yes, please explain

Does your company require a data room? Yes No

If so, is supplemental HVAC required?

Is close proximity to Mass Transit important?

Yes No

Minimum parking requirements

Copy/Fax room size requirements

How many people are in the reception area?

0 - 2

2 - 4

4 - 6

6 +



FUTURE PROJECTED FACILITIES NEEDS

How many conference rooms do you require, and how many will they need to seat?

Conference Room 1 - seats

Conference Room 2 - seats

Conference Room 3 - seats

Conference Room 4 - seats

Do you require a Kitchen/Break Area? Yes / No

If Yes, check all that apply:

Sink

Dishwasher

Refrigerator

Microwave

Upper Cabinetry

Lower Cabinetry

Seating/Tables/Chairs

Other:

Do you require a designated server room? Yes No

Approximate dimensions:

Is building signage important to you? Yes No

Comments:

CURRENT AND FUTURE EMPLOYEE COUNTS

- Please list general job types or departments and fill in blanks to the best of your knowledge.
- Then please indicate which work area type best describes the employees from each department.

Job Type or Department	Current Staff Per Type* Year 1	Work Area Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9
Example: Administrative	3	W1	3	4	5				

*Work Area Type:

01 = 10 x 12 Private Office

02 = 12 x 15 Private Office

W1 = 6 x 6 Workstation

W2 = 6 x 8 Workstation

W3 = 8 x 8 Workstation

Additional Comments:



ADDITIONAL COMMENTS

A large rectangular area with rounded corners, enclosed by a dotted border. It contains 25 horizontal dotted lines for writing.



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