

ASSISTED LIVING INCOME QUESTIONNAIRE

FOR THE 36 MONTHS FROM: 2023 TO 2025

PROPERTY AND OWNERSHIP INFORMATION:

- Name and Location of Property:

- Owner and Address of Record:

RENT SCHEDULES:	# UNITS	BATH/UNITS	2023 RENT/MO.	2024 RENT/MO.	2025 RENT/MO.
EFFICIENCY					
1 BEDROOM					
2 BEDROOM					
PARKING # SPACES					
COMMERCIAL:	# UNITS	AREA SF	2023 RENT/SF	2024 RENT/SF	2025 RENT/SF
RETAIL / OFFICES					
OTHER (LIST)					

ANNUAL INCOME AND EXPENSES: ACTUAL INCOME & EXPENSES ARE REQUIRED. AN ITEMIZED COMPUTER PRINTOUT MAY BE ATTACHED IN LIEU OF FILLING OUT THIS SECTION, SUBJECT TO REVIEW.

ANNUAL INCOME	2023	2024	2025
1. TOTAL GROSS RENTS @ 100% OCCUPANCY	\$	\$	\$
2. OWNER, JANITOR, MANAGER APARTMENTS	\$	\$	\$
3. OTHER INCOME (LIST)	\$	\$	\$
4. LOSS DUE TO VACANCY OR BAD DEBT	\$	\$	\$
5. TOTAL ACTUAL INCOME (LINES 1-4)	\$	\$	\$

EXPENSES	2023	2024	2025
6. PAYROLL (EXCEPT MANAGER, REPAIR)	\$	\$	\$
7. SUPPLIES (JANITOR, BULBS, ETC.)	\$	\$	\$
8. ELECTRICITY & UTILITIES	\$	\$	\$
9. HEATING FUEL (TYPE OF FUEL _____)	\$	\$	\$
10. MANAGEMENT FEES/WAGES	\$	\$	\$
11. ADMINISTRATIVE COST	\$	\$	\$
12. MAINTENANCE & REPAIRS (LIST)	\$	\$	\$
13. FOOD & BEVERAGE COST	\$	\$	\$
14. HOUSEKEEPING, LAUNDRY & LINEN	\$	\$	\$
15. NURSING	\$	\$	\$
16. RESIDENT ACTIVITIES	\$	\$	\$
17. MISCELLANEOUS EXPENSES (LIST)	\$	\$	\$
18. FIRE INSURANCE & EXTENDED COVERAGE	\$	\$	\$
19. RESERVES FOR REPLACEMENTS (LIST)	\$	\$	\$
20. REAL ESTATE TAXES	\$	\$	\$
21. BUILDING DEPRECIATION	\$	\$	\$
22. MORTGAGE INTEREST PAYMENT	\$	\$	\$

MORTGAGE/SALES INFORMATION:

1. IS THERE A CURRENT MORTGAGE ON THE PROPERTY? Yes _____ No _____ IF YES, PLEASE PROVIDE THE FOLLOWING DATA:

Name of Mortgagee	
Loan Amount	
Monthly Payment	
Interest Rate	
Term of Mortgage	

PLEASE PROVIDE: DATE PURCHASED _____ CONSIDERATION _____

2. IS THERE A LEASE OR MANAGEMENT AGREEMENT? Yes _____ No _____

IF SO, SUMMARIZE THE TERM AND CONDITIONS OF THE AGREEMENT TYPE: _____ MANAGEMENT _____ LEASE _____ SALE-LEASEBACK

LESSEE OR MANAGEMENT COMPANY: _____ DATE _____ TERM _____ FEE _____

I DECLARE, UNDER THE PENALTIES OF PERJURY, THAT THE CONTENTS OF THIS FORM AND ALL THE ACCOMPANYING SCHEDULES AND STATEMENTS HAVE BEEN EXAMINED BY ME AND ARE TRUE, CORRECT, AND COMPLETE TO THE BEST OF MY KNOWLEDGE, INFORMATION, AND BELIEF.

Owner's Signature

Title of Signer

Date

Print/Type Name of Signer

Phone Number

Email

MARYLAND STATE DEPARTMENT OF ASSESSMENTS & TAXATION
REAL PROPERTY DIVISION
 Listed below are the **mailing addresses** for local assessment offices

ASSESSMENT OFFICE MAILING ADDRESSES	PHONE	FAX	EMAIL
Allegany County Assessments 112 Baltimore Street, 3rd Floor, Cumberland, MD 21502	(301) 777-2108	(301) 777-2052	sdat.alle@maryland.gov
Anne Arundel County Assessments 45 Calvert St., 3rd Floor, Annapolis, MD 21401	(410) 974-5709	(410) 974-5738	sdat.aa@maryland.gov
Baltimore City Assessments Wm. Donald Schaefer Tower, 6 Saint Paul Street, 11th Floor, Baltimore, MD 21202	(410) 767-8250	(410) 333-4626	sdat.baltcity@maryland.gov
Baltimore County Assessments Hampton Plaza, 300 E Joppa Road, Suite 602, Towson, MD 21286	(410) 512-4900	(410) 321-4148	sdat.blco@maryland.gov
Calvert County Assessments State Office Bldg. 200 Duke Street, Room 1200, Prince Frederick, MD 20678	(443) 550-6840	(443) 550-6850	sdat.calv@maryland.gov
Caroline County Assessments Denton Multi-Service Center, 207 South 3rd St, Denton, MD 21629	(410) 819-4450	(410) 819-4441	sdat.crln@maryland.gov
Carroll County Assessments 15 E Main Street, Suite 229, Westminster, MD 21157	(410) 857-0600	(410) 857-0128	sdat.carl@maryland.gov
Cecil County Assessments District Court Multi-Service Center, 170 East Main Street, Elkton, MD 21921	(410) 996-2760	(410) 996-2770	sdat.cec@maryland.gov
Charles County Assessments Southern Maryland Trade Center, 101 Catalpa Drive Suite 101A, LaPlata, MD 20646	(301) 932-2440	(301) 932-2189	sdat.char@maryland.gov
Dorchester County Assessments 501 Court Lane, PO Box 488, Cambridge, MD 21613	(410) 228-3380	(410) 228-3704	sdat.dor@maryland.gov
Frederick County Assessments 5310 Spectrum Dr, Suite E, Frederick, MD 21703	(301) 815-5350	(301) 663-8941	sdat.fred@maryland.gov
Garrett County Assessments County Courthouse 317 East Alder St., Room 106, PO BOX 388, Oakland, MD 21550	(301) 334-1950	(301) 334-5018	sdat.gar@maryland.gov
Harford County Assessments Mary E.W. Risteau District Court Multi-Service Center, 2 South Bond Street, Suite 400, Belair, MD 21014	(410) 836-4800	(410) 838-5914	sdat.harf@maryland.gov
Howard County Assessments District Court Multi-Service Center, 3451 Court House Dr, Ellicott City, MD 21043	(410) 480-7940	(410) 480-7960	sdat.how@maryland.gov
Kent County Assessments 114-A Lynchburg Street, Chestertown, MD 21620	(410) 778-1410	(410) 778-1525	sdat.kentco@maryland.gov
Montgomery County Assessments 30 W. Gude Drive, Suite 400, Rockville MD 20850	(240) 314-4510	(301)424-3864	sdat.mont@maryland.gov
Prince George's County Assessments 14735 Main Street, Suite 354B, Upper Marlboro, MD 20772	(301) 952-2500	(301) 952-2955	sdat.princeg@maryland.gov
Queen Anne's County Assessments Carter M. Hickman District Court Multi-Service Center, 120 Broadway Suite 7, Centreville, MD 21617	(410) 819-4160	(410) 819-4170	sdat.qaco@maryland.gov
St Mary's County Assessments Carter Building, 23110 Leonard Hall Drive, Room 2059, PO Box 1509 Leonardtown, MD 20650	(301) 880-2900	(301)475-4856	sdat.stm@maryland.gov
Somerset County Assessments 11545 Somerset Avenue, Princess Anne, MD 21853	(410) 651-0868	(410) 651-1995	sdat.som@maryland.gov
Talbot County Assessments 29466 Pintail Drive, Suite 12, Easton, MD 21601	(410) 819-5920	(410) 822-0048	sdat.talb@maryland.gov
Washington County Assessments 3 Public Square, Hagerstown, MD 21740	(301) 791-3050	(301) 791-2925	sdat.wash@maryland.gov
Wicomico County Assessments Salisbury District Court Multi-Service Center, 201 Baptist Street, Box 8 Salisbury, MD 21801	(410) 713-3560	(410) 713-3570	sdat.wic@maryland.gov
Worcester County Assessments One West Market Street, Rm. 1202, Snow Hill, MD 21863	(410) 632-1196	(410) 632-1366	sdat.wor@maryland.gov

**ALL ASSESSMENT OFFICES ARE OPEN MONDAY - FRIDAY 8:00 AM – 4:30 PM,
 EXCEPT BALTIMORE CITY WHICH IS OPEN 8:00 AM – 5:00 PM**

For a complete list of office locations visit <http://dat.maryland.gov/realproperty/Pages/Maryland-Assessment-Offices.aspx>

Revised: 2/2025

