

# Client Information Survey



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## CLIENT DATA

### GENERAL:

Client \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

Contact Person \_\_\_\_\_ Title \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

### TYPE OF BUSINESS:

Office \_\_\_\_\_ Industrial \_\_\_\_\_

Age of Company \_\_\_\_\_ No. of Properties \_\_\_\_\_

### OWNERSHIP:

Public \_\_\_\_\_ Private \_\_\_\_\_ Partnership \_\_\_\_\_

### FINANCIAL:

Annual Revenues \_\_\_\_\_ Net Worth \_\_\_\_\_

D & B Report \_\_\_\_\_ Financial Statements \_\_\_\_\_

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## REAL ESTATE DATA

**PRIMARY USE:** \_\_\_\_\_

### PRESENT PROPERTY SIZE:

Office SF \_\_\_\_\_

Production SF \_\_\_\_\_

Warehouse SF \_\_\_\_\_

Total SF \_\_\_\_\_

### LAND:

Square Feet \_\_\_\_\_

Acres \_\_\_\_\_

**PARKING:** \_\_\_\_\_

### CURRENT / FUTURE PROPERTY REQUIREMENTS:

Office:

Production:

Distribution:

### MISCELLANEOUS:

Own vs. Lease Preference: \_\_\_\_\_

Who makes final decision and executes contracts? \_\_\_\_\_

Who handles real estate negotiation? \_\_\_\_\_

**FACILITY REQUIREMENTS**

**WAREHOUSE SPECS:**

**CLEAR HEIGHT**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**# OF DOCKS AND SIZE**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**# OF DRIVE-INS AND SIZE**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**ELECTRICAL SERVICE**

Amps \_\_\_\_\_  
Volts \_\_\_\_\_  
Phase \_\_\_\_\_  
Drops Needed \_\_\_\_\_

**SPRINKLER TYPE**

None \_\_\_\_\_  
Wet \_\_\_\_\_  
ESFR \_\_\_\_\_  
Dry \_\_\_\_\_

**HAZARDOUS MATERIALS**

Yes \_\_\_\_\_  
Type \_\_\_\_\_  
No \_\_\_\_\_

**OUTSIDE STORAGE**

Yes \_\_\_\_\_  
Product \_\_\_\_\_  
No \_\_\_\_\_

**RAIL**

Yes \_\_\_\_\_  
No \_\_\_\_\_

**HVAC**

Heat \_\_\_\_\_  
Ventilation \_\_\_\_\_  
Air Conditioning \_\_\_\_\_

**OFFICE SPECS:**

**AREAS**

Reception Area - # of Visitors \_\_\_\_\_

Conference Rooms - # and Sizes

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Lunch/Break Room - Size \_\_\_\_\_

Mailroom - Size \_\_\_\_\_

Computer/Equipment Room - Size \_\_\_\_\_

Coffee Bar - Size \_\_\_\_\_

Supply/Storage Room - Size \_\_\_\_\_

Private Offices - # and Sizes

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Cubicles - # and Sizes

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

IT Specifications

## GENERAL TRANSACTION TERMS

KEY DATES:	LEASE:	PURCHASE:
Program _____	Term _____	Budget _____
Search _____	Renewal _____	Financing _____
Negotiation _____	Expiration/Contraction _____	Due Diligence _____
Execution of Contract _____	Termination _____	
TI Completion _____	Option to Purchase _____	
Move _____		

## COMMENTS