

# OFFICIAL REQUEST

## ELDERLY HOUSING, ASSISTED LIVING, AND NURSING HOME INCOME AND EXPENSE SURVEY



CITY OF ALEXANDRIA  
OFFICE OF REAL ESTATE ASSESSMENTS  
703.746.4646

Tax Assessment Map #      Abstract Code      Account #

This form is also available at [alexandriava.gov/realestate](http://alexandriava.gov/realestate).  
You may download the form, enter the data via the fillable PDF,  
and email it to [realestate@alexandriava.gov](mailto:realestate@alexandriava.gov).

**RETURN TO:**

CITY OF ALEXANDRIA  
OFFICE OF REAL ESTATE ASSESSMENTS  
P.O. BOX 178  
ALEXANDRIA, VIRGINIA 22313-1501

**Dear Property Owner:**

The Office of Real Estate Assessments is in the process of collecting and analyzing information for the annual reassessment of real estate located in the City of Alexandria. This is an official request pursuant to Section 58.1-3294 of the **Code of Virginia** that requires you to furnish this office with income and expense data for any income producing properties for calendar year 2023. This request is also in compliance with Section 3-2-186 of the Alexandria City Code. All information submitted will be kept strictly confidential under the stipulations of Section 58.1-3 of the **Code of Virginia**.

This survey form is to be completed by the property owner or a duly authorized agent, showing the gross income (at 100% occupancy), vacancies and expenses for the above referenced property. The information should encompass the 2023 calendar year.

Income information related to calendar year 2023 that you may have previously submitted to the Office of Real Estate Assessments or to the Board of Equalization as part of a review or an appeal, **must be resubmitted at this time to satisfy this request**. The income information requested by the Department of Finance regarding business licenses is not associated with this request.

In addition to the information requested as part of this survey, we request that you submit any other income or expense information that you believe to be relevant to the assessment of your property.

I would like to remind you that any Request for Review of Assessment filed with this office, or any Appeal of Assessment filed with the Board of Equalization, that is based upon the income or expense attributable to your property will not be considered unless this information has been filed on time.

The enclosed self-addressed envelope is provided for your convenience. The income information must be returned to our office no later than **May 1, 2024** or postmarked by the U.S. Postal Service no later than **May 1, 2024**.

If you have any questions regarding this matter or wish to discuss this request form with a member of our appraisal staff, please call between 8:00 a.m. and 5:00 p.m., Monday through Friday. Your cooperation and timely response to this legal requirement will be greatly appreciated.

Sincerely,

**The Office of Real Estate Assessments**  
Enclosure

**A. The Income and Expense Information must be placed on this form. No alternative forms may be used. If you should have any questions or need assistance, please call our office at 703.746.4646.**

**CERTIFICATION**

(State law requires certification by the owner or officially authorized representative. Please type or print)

Facility Name:	Owner Name(s):
Property Address:	
Property Type: <input type="checkbox"/> Skilled Nursing Facility <input type="checkbox"/> Independent Living Units or Elderly Apartments (check all that apply) <input type="checkbox"/> Assisted Living / Personal Care <input type="checkbox"/> Lifecare Facility or Continuing Care Retirement Community	

**All information including the accompanying schedules and statements have been examined by me and to the best of my knowledge and belief are true, correct, and complete.**

Name of Management Company:	Contact Person:
Mailing Address:	Signature:
	Title:
	E-mail:
Phone:	Date:

**B. DESCRIPTION OF THE FACILITY**

Please check the box or boxes below that best describe this facility.

<b>1. INDEPENDENT LIVING</b>		
<input type="checkbox"/>	Total number of Units	
	Percentage of Annual occupancy	

<b>2. ASSISTED LIVING</b>		
<input type="checkbox"/>	Total number of Units	
	Total number of beds	
	Percentage of Annual occupancy	

<b>3. LIFECARE OR CONTINUING CARE RETIREMENT COMMUNITY</b>		
<input type="checkbox"/>	Total number of Units	
	Total number of beds	
	Percentage of Annual occupancy	

<b>4. SKILLED NURSING FACILITY</b>		
<input type="checkbox"/>	Total number of beds	
	Annual occupancy	

**C. ANNUAL INCOME (CALENDAR YEAR 2023)**

01 Resident Fees .....	\$ _____
02 Community Fees .....	\$ _____
03 Extended Care .....	\$ _____
04 Medication Fees .....	\$ _____
05 Incontinence Management .....	\$ _____
06 Adult Day Care/Home Health .....	\$ _____
07 Meal Programs .....	\$ _____
08 Therapy Revenue .....	\$ _____
09 Ancillary Revenue .....	\$ _____
10 Other Revenue .....	\$ _____
<b>11 TOTAL REVENUE (total of lines 01 through 10) .....</b>	<b>\$ _____</b>

**D. DEPARTMENTAL EXPENSES**

12 Dietary .....	\$ _____
13 Housekeeping/Laundry .....	\$ _____
14 Activities/Recreation .....	\$ _____
15 Administration .....	\$ _____
16 Maintenance and Security .....	\$ _____
17 Utilities .....	\$ _____
18 Transportation .....	\$ _____
19 Resident Care .....	\$ _____
20 Sales and Marketing .....	\$ _____
21 Therapy Services .....	\$ _____
22 Ancillary Costs .....	\$ _____
<b>23 TOTAL DEPARTMENTAL EXPENSES (total of lines 12 through 22) .....</b>	<b>\$ _____</b>

<b>E. NON-DEPARTMENTAL EXPENSES</b>	
24 Management Fee .....	\$ _____
25 Personal Property Tax .....	\$ _____
26 2023 Alexandria Stormwater Utility Fee.....	\$ _____
27 Real Estate Tax .....	\$ _____
28 Other Taxes .....	\$ _____
29 Insurance .....	\$ _____
30 Other Non-Department Expenses .....	\$ _____
31 Miscellaneous .....	\$ _____
<b>32 TOTAL NON-DEPARTMENTAL EXPENSES (total of lines 24 through 30) .....</b>	<b>\$ _____</b>

**F. TOTAL OPERATING EXPENSES (total of lines 23 and 32) .....** \$ \_\_\_\_\_

**G. CAPITAL IMPROVEMENTS**

Has the property had Capital Improvements or Capital Renovations during this reporting period?  Yes  No

If yes, please provide total costs and attach a detailed list on a separate page. Please reflect only those capital costs that were actually expensed in calendar year 2023.

**H. FURNITURE, FIXTURES AND EQUIPMENT (FF&E) AND PERSONAL PROPERTY**

What was the value of personal property or FF&E as reported on the City of Alexandria Personal Property Tax Form?  
\$ \_\_\_\_\_

I. Is there any other information you consider pertinent to the equitable evaluation of this property? Please attach additional sheets if necessary.

**J. DEBT SERVICE INFORMATION**

Has there been a professional appraisal on this real property in the last five years?  Yes  No

If yes, appraiser's estimate of value \$ \_\_\_\_\_ Date of value \_\_\_\_\_