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 a part of a rental property.

CONTACT INFORMATION

Please provide your contact information.

Name:
Title:
Email:
Phone:
Street Address:
City: State: Zip:

CURRENT OWNER OR MANAGER

Are you currently the owner, manager, or acting on behalf of the owner/manager of this rental property?

☐ Yes
☐ No

OWNER CONTACT INFORMATION

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

Name:
Title:
Email:
Organization:
Address:
City: State: ZIP Code:
Telephone Number:

1.
RENTAL PROPERTY CONFIRMATION

Is the property at this address a rental property?
Include properties that are rented or vacant but available for rent.

- ☐ Yes
- ☐ No

1a.
PROPERTY TYPE – PUBLIC HOUSING AUTHORITY

Is this rental property operated by a public housing authority?

- ☐ Yes
- ☐ No

1b.
PROPERTY TYPE – MANUFACTURED HOUSING COMMUNITY

Is this rental property part of a manufactured housing community (manufactured/mobile homes)?

- ☐ Yes
- ☐ No

1c.
PROPERTY TYPE – TOWNHOMES

Is this rental property a series of townhomes or row houses?

- ☐ Yes
- ☐ No

DEFINING PROPERTY – PROPERTY DEFINITION

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?

- ☐ The rental property is composed of a single residential building located at the address above
- ☐ The rental property is composed of multiple residential buildings that are all located at the address above
- ☐ The rental property is composed of multiple residential buildings at multiple addresses that includes the building(s) at the address above
- ☐ Other

PROPERTY ADDRESSES

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:

City: State: ZIP Code:

Buildings at this address: Units at this address:

Street:

City: State: ZIP Code:

Buildings at this address: Units at this address:

Street:

City: State: ZIP Code:

Buildings at this address: Units at this address:

Street:

City: State: ZIP Code:

Buildings at this address: Units at this address:

Street:

City: State: ZIP Code:

Buildings at this address: Units at this address:

Total Buildings: Total Units:

SERVICES AVAILABLE

Does this rental property include residential units that are considered –

A nursing home?

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.

- ☐ Yes
- ☐ No
- ☐ Don't Know

An Assisted Living facility?

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.

- ☐ Yes
- ☐ No
- ☐ Don't Know

A SENIOR Independent Living community?

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.

- ☐ Yes
- ☐ No
- ☐ Don't Know

NUMBER OF UNITS RECEIVING SERVICES

Of the_____ you reported, how many units:

- Receive nursing care services? _____ Number of units
- Receive assisted living services? _____ Number of units
- Are considered SENIOR Independent Living? _____ Number of units

UNIT_STAT

UNIT OCCUPIED

Is this unit rented, vacant-for rent, occupied by owner or property personnel, or vacant for other reasons?

- ☐ Rented
- ☐ Vacant-for rent
- ☐ Occupied by owner or property personnel
- ☐ Vacant for other reasons

3av.

YEAR CONSTRUCTED VERIFICATION

According to public records, we have recorded that

- this home was manufactured in
- this residential building was constructed in
- the oldest home was manufactured in
- the oldest residential building on this property was constructed in

_____. Is this correct?

☐ Yes
☐ No

3a.

YEAR CONSTRUCTED

In what year: _____

- was this home manufactured?
- was the oldest home manufactured?
- was the residential building on this rental property constructed?
- was the oldest residential building on this property constructed?

3bv.

YEAR NEWEST BUILDING CONSTRUCTED VERIFICATION

According to public records, we have recorded that

- the most recent home was manufactured in
- the most recent residential building on this rental property was constructed in

_____. Is this correct?

☐ Yes
☐ No

3b.

YEAR MOST RECENT BUILDING CONSTRUCTED

In what year was the most recent residential building on this rental property constructed? _____

4.

PROPERTY ACQUISITION

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

☐ I purchased the land then proceeded to develop new residential building(s) (including razing existing structures on the land).

☐ 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.

☐ I purchased the property in a condition that did not require substantial rehabilitation to make it suitable for the target rental market.

4a.

YEAR PROPERTY ACQUIRED

In what year: _____

- did you complete the substantial rehabilitation?
- was this rental property acquired (if original owner, report year construction was completed)?

4b.

PURCHASE PRICE OF PROPERTY

What was the purchase price of this rental property?

$		.00

4b1.

CASH DOWN PAYMENT

Did you make a cash down payment when you purchased this rental property?

- ☐ Yes
- ☐ No

4b2.

AMOUNT OF CASH DOWN PAYMENT

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

$		.00

4c-4d.

CURRENT MARKET VALUE

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

$		.00

Which of the following best reflect how you determined your estimate of the current market value?

- ☐ Local tax assessment of this property
- ☐ Recent real estate appraisal
- ☐ Insurance replacement cost
- ☐ Original purchase price plus inflation
- ☐ Original purchase price plus improvements and inflation
- ☐ Selling or asking price of similar properties in area
- ☐ Capitalization of current rental revenues
- ☐ Other

5.

UNITS PER BUILDING

Of the_____residential units reported, how many belong to each of the following categories?

	Efficiency or studio (no bedrooms)	1 bedroom	2 bedrooms	3 bedrooms or more	TOTAL
Rented					
Vacant-for rent					
Occupied by the property owner					
Occupied by property personnel					
Vacant for other reasons					
Total residential units					

PUBLIC RECORD BEDROOMS

According to public records, we have recorded _____ bedroom/bedrooms for this residential unit. Is this correct?

☐ Yes
☐ No

NUMBER OF BEDROOMS

How many bedrooms are in this residential unit?

____ Bedrooms

5a_b

LOW AND HIGH RENT

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

$		.00

What is the highest 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

6.

LEVEL OF RENT PER MONTH

What is the rent per month?

$		.00

Of the_____ residential units identified as RENTED OR VACANT-FOR RENT, how many are offered at each level of rent per month? *Enter unit count for each box where appropriate.*

	Efficiency or studio (no bedrooms)	1 bedroom	2 bedrooms	3 bedrooms or more	Totals
No rent					
$1 - $249					
$250 - $274					
$275 – $299					
$300 - $349					
$350 - $399					
$400 - $449					
$450 - $499					
$500 - $549					
$550 - $599					
$600 - $649					
$650 - $699					
$700 - $749					
$750 - $799					
$800 - $899					
$900 - $999					
$1,000 - $1,099					
$1,100 - $1,249					
$1,250 - $1,499					
$1,500 - $1,999					
$2,000 - $2,499					
$2,500 - $2,999					
$3,000 - $3,499					
$3,500 – $3,999					
$4,000 - $4,499					
$4,500 - $4,999					
$5,000 or more					
Total residential units:					

6a.

LEASE LENGTH

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

- ☐ Long-term (6 months or longer)
- ☐ Short-term (2-6 months)
- ☐ Weekly

6b.

DAILY/WEEKLY LEASE LENGTH AVAILABILITY

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

- ☐ Yes
- ☐ No

6c.

NUMBER OF UNITS AVAILABLE FOR DAILY/WEEKLY LEASE

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

_____ Units

6d.

PERCENTAGE OF UNITS AVAILABLE FOR DAILY/WEEKLY LEASE

Approximately how many of your apartments are made available for daily or weekly rental?

- ☐ Less than 10 percent
- ☐ 10-25 percent
- ☐ Greater than 25 percent

7a.

RENT CONCESSIONS 1

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 the residential unit / 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?

- ☐ No rent concessions
- ☐ Less than 1 month's rent
- ☐ 1 month's rent
- ☐ Greater than 1 month's rent

7b.

RENT CONCESSIONS 2

How many current residential units received rent concessions as part of their current lease?

_____ Units

8.

AGE RESTRICTIONS

Is this building / Are these buildings in a development that is age restricted?

☐ Yes
☐ No

9.

RENT CONTROL

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

Is this residential unit subject to rent control or stabilization?

☐ Yes
☐ No

10.

PARKING

How many parking spaces are associated with the rental property? Include all surface parking lots and garages.

_____ Spaces

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

☐ Yes
☐ No

11a.

UTILITIES

Are the following utilities included or not included in the rent?

Electricity
- ☐ Included in rent
- ☐ Not included in rent

Gas/Fuel oil
- ☐ Included in rent
- ☐ Not included in rent
- ☐ Not available

Water
- ☐ Included in rent
- ☐ Not included in rent

Sewer
- ☐ Included in rent
- ☐ Not included in rent

11b.

AMENITIES

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 rental previously reported.

Cable or Satellite TV
- ☐ Included in rent
- ☐ Not included in rent

Internet or WiFi
- ☐ Included in rent
- ☐ Not included in rent

Swimming pool
- ☐ Included in rent
- ☐ Not included in rent
- ☐ Not available

Off-street parking
- ☐ Included in rent
- ☐ Not included in rent
- ☐ Not available

11c.

ABLE TO ANSWER INCOME AND EXPENSES

You indicated that you purchased the

-rental property in 2020.

-land and developed new residential buildings.

Are you able to answer questions about the total income and expenses during 2020?

- ☐ Yes
- ☐ No

12a.

TOTAL RENT COLLECTED DURING CALENDAR YEAR 2020

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

$		.00

13.

COMMERCIAL USE

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)?

☐ Yes
☐ No

14b.

RECEIPTS FROM COMMERCIAL RENT

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

☐ Yes
☐ No

How much income did you receive from the commercial use of this rental property?

$		.00

15a.

RESPONSIBILITY FOR DAY-TO-DAY MANAGEMENT

Who has the responsibility for the day-to-day management of this rental property?

☐ Property owner or unpaid agent of owner (such as a family member)
☐ Management agent directly employed by owner
☐ Management company
☐ Other

15b.

HOURS MANAGING

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

_____Hours

15c.

USE OF ADVERTISING

At any time during the past year, did you advertise a vacant unit?

- ☐ Yes
- ☐ No

15d.

ADVERTISING METHODS

Please answer Yes or No to the following questions. Did you advertise using...

A website dedicated solely to your rental property?

- ☐ Yes
- ☐ No
- ☐ Don't Know

Online real-estate classifieds (Craigslist, Apartment.com, Realtor.com, Zillow, etc.)?

- ☐ Yes
- ☐ No
- ☐ Don't Know

Other online advertisement (using a method such as Search Engine Marketing (SEM), Social Media Advertising, Banners)?

- ☐ Yes
- ☐ No
- ☐ Don't Know

A newspaper or other print publication, such as an apartment guide?

- ☐ Yes
- ☐ No
- ☐ Don't Know

An apartment rental agency listing?

- ☐ Yes
- ☐ No
- ☐ Don't Know

A real estate agent?

- ☐ Yes
- ☐ No
- ☐ Don't Know

15e.

ADVERTISING ON MLS

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)?

- ☐ Yes
- ☐ No
- ☐ Don't Know

16.

OPERATING EXPENSES

The next 2 questions ask about operating expenses and capital improvements. 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 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)?

Operating Expense	Yearly Cost	
Payroll costs for employees hired directly by owner	$_____.00	☐ Not Applicable
Real estate property taxes	$_____.00	☐ Not Applicable
Insurance	$_____.00	☐ Not Applicable
Electric/Gas/Fuel oil	$_____.00	☐ Not Applicable
Water/Sewer	$_____.00	☐ Not Applicable
Maintenance and repairs	$_____.00	☐ Not Applicable
Management company	$_____.00	☐ Not Applicable
Other professional services (legal, accounting)	$_____.00	☐ Not Applicable
Security	$_____.00	☐ Not Applicable
Grounds/landscaping	$_____.00	☐ Not Applicable
Any other operating expenses	$_____.00	☐ Not Applicable

17.

CAPITAL IMPROVEMENTS OR UPGRADES/REPLACEMENTS

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 rental property? If so, what were their associated costs?

Capital Improvement	Associated Cost	
Heating or air conditioning system	$_____.00 or	☐ Not Applicable
Roof	$_____.00 or	☐ Not Applicable
Windows	$_____.00 or	☐ Not Applicable
Doors	$_____.00 or	☐ Not Applicable
Flooring/carpeting	$_____.00 or	☐ Not Applicable
Exterior	$_____.00 or	☐ Not Applicable
Plumbing system	$_____.00 or	☐ Not Applicable
Electrical system	$_____.00 or	☐ Not Applicable
Kitchen facilities	$_____.00 or	☐ Not Applicable
Bathroom facilities	$_____.00 or	☐ Not Applicable
Handicapped/universal access	$_____.00 or	☐ Not Applicable
All other capital improvements or updates	$_____.00 or	☐ Not Applicable

OR

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

Total costs for your capital expenditures

$_____.00

17a.

ESTIMATED CAPITAL RESERVES BALANCE

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

18.

CURRENT OWNERSHIP ENTITY

How would you best describe the current ownership entity?

- ☐ Individual investor, including joint ownership by two or more individuals, such as a married couple
- ☐ Trustee for estate
- ☐ LLP, LP, or LLC
- ☐ Tenant in common
- ☐ General partnership
- ☐ Real Estate Investment Trust (REIT)
- ☐ Real estate corporation
- ☐ Housing cooperative organization or stock cooperative
- ☐ Nonprofit organization (including religious institution, labor union, or fraternal organization)
- ☐ Other kind of institution

19a.

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?

OR

Do your tenants receive a HUD rental subsidy?

- ☐ Yes
- ☐ No
- ☐ Don't know

19b.

NUMBER OF HUD SUBSIDY

How many units receive a HUD rental subsidy or are occupied by a tenant who receives a HUD rental subsidy? _____ Units

22.

FEDERAL PROPERTY BENEFITS

Does this rental property benefit from any of the following **Federal** programs?

A federal government-sponsored, below-market interest rate loan

- ☐ Yes
- ☐ No
- ☐ Don't know

A federal government rental subsidy OTHER than Section 8 payments to project or tenants

- ☐ Yes
- ☐ No
- ☐ Don't know

Housing for the elderly direct loan program (Section 202)

- ☐ Yes
- ☐ No
- ☐ Don't know

A government grant (HOME, CDBG, HOPEVI)

- ☐ Yes
- ☐ No
- ☐ Don't know

Other federal benefit

- ☐ Yes
- ☐ No
- ☐ Don't Know

22a1.

LOW-INCOME HOUSING TAX CREDIT PROGRAM BENEFIT

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

- ☐ Yes
- ☐ No
- ☐ Don't know

22a2.

NUMBER OF HUD SUBSIDY

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

_____ Units

22b.

STATE PROPERTY BENEFITS

Does this rental property benefit from **State** Low-Income Housing Tax Credit?

- ☐ Yes
- ☐ No
- ☐ Don't know

23.

REAL ESTATE TAX REDUCTIONS

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?

For historic preservation

- ☐ Yes
- ☐ No
- ☐ Don't know

Because this rental property houses low-income tenants

- ☐ Yes
- ☐ No
- ☐ Don't know

Because this rental property is in a low-income area

- ☐ Yes
- ☐ No
- ☐ Don't know

Because this rental property is in a targeted economic development area

- ☐ Yes
- ☐ No
- ☐ Don't know

For some other reason

- ☐ Yes
- ☐ No
- ☐ Don't know

MORTGAGE SECTION INTRODUCTION

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)

24a

PROPERTY DEBT

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

- ☐ Yes
- ☐ No

24b

NO MORTGAGE

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

- ☐ I do not need a mortgage at this time
- ☐ I have tried to get a mortgage, but was denied
- ☐ Other

24c

NUMBER OF MORTGAGES

How many mortgages or similar debts are on this property?

____ Mortgages or similar debts

25

DEBT DESCRIPTION

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

Is the first debt – Debt#1

- ☐ 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)?

Is the second debt – Debt#2

- ☐ 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)?

Is the third debt – Debt#3

- ☐ 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)?

Is the fourth debt – Debt#4

- ☐ 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)?

For the purposes of this survey, we only collect information on the first four debts on the rental property. The following section will refer to the debt(s) reported in the previous question.

DEBT 1 INQUIRIES

27a_1

DEBT 1 ORIGINATION

When did the Debt#1 on this rental property originate?

_____ YEAR

27b_1

DEBT 1 ORIGINAL AMOUNT

What was the original amount on the Debt#1?

$		.00

27d_1

DEBT 1 OUTSTANDING BALANCE

What is the outstanding balance on the Debt#1?

$		.00

27ef_1

DEBT 1 LINE OF CREDIT AMOUNT

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

$		.00

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

$		.00

27c_1

DEBT 1 ORIGINAL VALUE AT ORIGINATION

What was the original value of this rental property at the time of the Debt#1 origination?

$		.00

28_1

DEBT 1 TYPE OF MORTGAGE

Is the Debt#1 on this rental property –

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

29_1

DEBT 1 MORTGAGE SOURCE

Where did you get the Debt#1 on this rental property?

(Note: A mortgage bank ONLY provides mortgage services. It does not provide other banking services.)

- ☐ Commercial bank or trust company
- ☐ Savings and loan association, federal savings bank, mutual savings bank
- ☐ Life insurance company
- ☐ Mortgage bank or mortgage company
- ☐ Credit union
- ☐ Finance company (including consumer discount company, industrial bank, cooperative bank)
- ☐ State or municipal government
- ☐ State or local housing finance agency
- ☐ Individual or individual's estate
- ☐ Other – Specify: _____
- ☐ Don't know

31a_1

DEBT 1 TERM OF THE LOAN

What is the term of the loan on this rental property's Debt#1?

_____ Years

35ascrn_1

DEBT 1 HOME EQUITY TYPE

Is this debt a home equity line of credit (HELOC) or a home equity loan?

- ☐ A home equity line of credit (HELOC)
- ☐ Home equity loan

35a_1

DEBT 1 REGULARLY REQUIRED PAYMENTS

Are there regularly required payments on this rental property's Debt#1?

- ☐ Yes
- ☐ No

35b_1

DEBT 1 RECENT REGULARLY REQUIRED PAYMENT

For this rental property's Debt#1, what was the amount of the most recent regularly required payment, including tax and insurance, if required?

$		.00

35c_1

DEBT 1 PAYMENT FREQUENCY

For this rental property's Debt#1, how often are these payments required to be made?

- ☐ Biweekly (every 2 weeks)
- ☐ Monthly
- ☐ Quarterly
- ☐ Other- Specify: _____

35d_1

DEBT 1 INCLUDED IN PAYMENT

For this rental property's Debt#1, what does this regular payment include?

Principal
- ☐ Yes
- ☐ No
- ☐ Don't know

Interest
- ☐ Yes
- ☐ No
- ☐ Don't know

Property insurance
- ☐ Yes
- ☐ No
- ☐ Don't know

Private mortgage insurance (PMI)
- ☐ Yes
- ☐ No
- ☐ Don't know

Property taxes
- ☐ Yes
- ☐ No
- ☐ Don't know

DEBT 2 INQUIRIES

27a_2.

DEBT 2 ORIGINATION

When did the Debt#2 on this rental property originate?

_____ YEAR

27b_2

DEBT 2 ORIGINAL AMOUNT

What was the original amount on the Debt#2?

$		.00

27d_2

DEBT 2 OUTSTANDING BALANCE

What is the outstanding balance on the Debt#2?

$		.00

27ef_2

DEBT 2 LINE OF CREDIT AMOUNT

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

$		.00

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

$		.00

27c_2

DEBT 2 ORIGINAL VALUE AT ORIGINATION

What was the original value of this rental property at the time of the Debt#2 origination?

$		.00

28_2

DEBT 2 TYPE OF MORTGAGE

Is the Debt#2 on this rental property –

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

29_2

DEBT 2 MORTGAGE SOURCE

Where did you get the Debt#2 on this rental property?

(Note: A mortgage bank ONLY provides mortgage services. It does not provide other banking services.)

- ☐ Commercial bank or trust company
- ☐ Savings and loan association, federal savings bank, mutual savings bank
- ☐ Life insurance company
- ☐ Mortgage bank or mortgage company
- ☐ Credit union
- ☐ Finance company (including consumer discount company, industrial bank, cooperative bank)
- ☐ State or municipal government
- ☐ State or local housing finance agency
- ☐ Individual or individual's estate
- ☐ Other – Specify: _____
- ☐ Don't know

31a_2

DEBT 2 TERM OF THE LOAN

What is the term of the loan on this rental property's Debt#2?

_____ Years

35ascrn_2

DEBT 2 HOME EQUITY TYPE

Is this debt a home equity line of credit (HELOC) or a home equity loan?

- ☐ A home equity line of credit (HELOC)
- ☐ Home equity loan

35a_2

DEBT 2 REGULARLY REQUIRED PAYMENTS

Are there regularly required payments on this rental property's Debt#2?

- ☐ Yes
- ☐ No

35b_2

DEBT 2 RECENT REGULARLY REQUIRED PAYMENT

For this rental property's Debt#2, what was the amount of the most recent regularly required payment, including tax and insurance, if required?

$		.00

35c_2

DEBT 2 PAYMENT FREQUENCY

For this rental property's Debt#2, how often are these payments required to be made?

- ☐ Biweekly (every 2 weeks)
- ☐ Monthly
- ☐ Quarterly
- ☐ Other- Specify: _____

35d_2

DEBT 2 INCLUDED IN PAYMENT

For this rental property's Debt#2, what does this regular payment include?

Principal
- ☐ Yes
- ☐ No
- ☐ Don't know

Interest
- ☐ Yes
- ☐ No
- ☐ Don't know

Property insurance
- ☐ Yes
- ☐ No
- ☐ Don't know

Private mortgage insurance (PMI)
- ☐ Yes
- ☐ No
- ☐ Don't know

Property taxes
- ☐ Yes
- ☐ No
- ☐ Don't know

DEBT 3 INQUIRIES

27a_3.

DEBT 3 ORIGINATION

When did the Debt#3 on this rental property originate?

_____ YEAR

27b_3

DEBT 3 ORIGINAL AMOUNT

What was the original amount on the Debt#3?

$		.00

27d_3

DEBT 3 OUTSTANDING BALANCE

What is the outstanding balance on the Debt#3?

$		.00

27ef_3

DEBT 3 LINE OF CREDIT AMOUNT

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

$		.00

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

$		.00

27c_3

DEBT 3 ORIGINAL VALUE AT ORIGINATION

What was the original value of this rental property at the time of the Debt#3 origination?

$		.00

28_3

DEBT 3 TYPE OF MORTGAGE

Is the Debt#3 on this rental property –

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

29_3

DEBT 3 MORTGAGE SOURCE

Where did you get the Debt#3 on this rental property?

(Note: A mortgage bank ONLY provides mortgage services. It does not provide other banking services.)

- ☐ Commercial bank or trust company
- ☐ Savings and loan association, federal savings bank, mutual savings bank
- ☐ Life insurance company
- ☐ Mortgage bank or mortgage company
- ☐ Credit union
- ☐ Finance company (including consumer discount company, industrial bank, cooperative bank)
- ☐ State or municipal government
- ☐ State or local housing finance agency
- ☐ Individual or individual's estate
- ☐ Other – Specify: _____
- ☐ Don't know

31a_3

DEBT 3 TERM OF THE LOAN

What is the term of the loan on this rental property's Debt#3?

_____ Years

35ascrn_3

DEBT 3 HOME EQUITY TYPE

Is this debt a home equity line of credit (HELOC) or a home equity loan?

- ☐ A home equity line of credit (HELOC)
- ☐ Home equity loan

35a_3

DEBT 3 REGULARLY REQUIRED PAYMENTS

Are there regularly required payments on this rental property's Debt#3?

- ☐ Yes
- ☐ No

35b_3

DEBT 3 RECENT REGULARLY REQUIRED PAYMENT

For this rental property's Debt#3, what was the amount of the most recent regularly required payment, including tax and insurance, if required?

$		.00

35c_3

DEBT 3 PAYMENT FREQUENCY

For this rental property's Debt#3, how often are these payments required to be made?

- ☐ Biweekly (every 2 weeks)
- ☐ Monthly
- ☐ Quarterly
- ☐ Other- Specify: _____

35d_3

DEBT 3 INCLUDED IN PAYMENT

For this rental property's Debt#3, what does this regular payment include?

Principal
- ☐ Yes
- ☐ No
- ☐ Don't know

Interest
- ☐ Yes
- ☐ No
- ☐ Don't know

Property insurance
- ☐ Yes
- ☐ No
- ☐ Don't know

Private mortgage insurance (PMI)
- ☐ Yes
- ☐ No
- ☐ Don't know

Property taxes
- ☐ Yes
- ☐ No
- ☐ Don't know

DEBT 4 INQUIRIES

27a_4.

DEBT 4 ORIGINATION

When did the Debt#4 on this rental property originate?

_____ YEAR

27b_4

DEBT 4 ORIGINAL AMOUNT

What was the original amount on the Debt#4?

$		.00

27d_4

DEBT 4 OUTSTANDING BALANCE

What is the outstanding balance on the Debt#4?

$		.00

27ef_4

DEBT 4 LINE OF CREDIT AMOUNT

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

$		.00

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

$		.00

27c_4

DEBT 4 ORIGINAL VALUE AT ORIGINATION

What was the original value of this rental property at the time of the Debt#4 origination?

$		.00

28_4

DEBT 4 TYPE OF MORTGAGE

Is the Debt#4 on this rental property –

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

29_4

DEBT 4 MORTGAGE SOURCE

Where did you get the Debt#4 on this rental property?

(Note: A mortgage bank ONLY provides mortgage services. It does not provide other banking services.)

- ☐ Commercial bank or trust company
- ☐ Savings and loan association, federal savings bank, mutual savings bank
- ☐ Life insurance company
- ☐ Mortgage bank or mortgage company
- ☐ Credit union
- ☐ Finance company (including consumer discount company, industrial bank, cooperative bank)
- ☐ State or municipal government
- ☐ State or local housing finance agency
- ☐ Individual or individual's estate
- ☐ Other – Specify: _____
- ☐ Don't know

31a_4

DEBT 4 TERM OF THE LOAN

What is the term of the loan on this rental property's Debt#4?

_____ Years

35ascrn_4

DEBT 4 HOME EQUITY TYPE

Is this debt a home equity line of credit (HELOC) or a home equity loan?

- ☐ A home equity line of credit (HELOC)
- ☐ Home equity loan

35a_4

DEBT 4 REGULARLY REQUIRED PAYMENTS

Are there regularly required payments on this rental property's Debt#4?

- ☐ Yes
- ☐ No

35b_4

DEBT 4 RECENT REGULARLY REQUIRED PAYMENT

For this rental property's Debt#4, what was the amount of the most recent regularly required payment, including tax and insurance, if required?

$		.00

35c_4

DEBT 4 PAYMENT FREQUENCY

For this rental property's Debt#4, how often are these payments required to be made?

- ☐ Biweekly (every 2 weeks)
- ☐ Monthly
- ☐ Quarterly
- ☐ Other- Specify: _____

35d_4

DEBT 4 INCLUDED IN PAYMENT

For this rental property's Debt#4, what does this regular payment include?

Principal
- ☐ Yes
- ☐ No
- ☐ Don't know

Interest
- ☐ Yes
- ☐ No
- ☐ Don't know

Property insurance
- ☐ Yes
- ☐ No
- ☐ Don't know

Private mortgage insurance (PMI)
- ☐ Yes
- ☐ No
- ☐ Don't know

Property taxes
- ☐ Yes
- ☐ No
- ☐ Don't know

37

HUD VOUCHERS

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

- ☐ Yes
- ☐ No
- ☐ Don’t know

Thank you for participating in the Rental Housing Finance Survey. We appreciate your time.