



## What to Expect in the Leasing Process

A lease, at its core, is a business relationship – an agreement between a tenant and a landlord. Although leasing commercial real estate may appear simplistic, perhaps even one-dimensional, it is crucial to take 7 essential steps. Otherwise, the process can turn into disarray.

1. Credit application filled out by prospective tenant and submitted to Lee & Associates with a check for \$37 for a personal application or \$67 for a corporate application. (All Corporate applications must be personally guaranteed and therefore a personal credit check will be required in addition to a corporate application.)
2. Credit check reviewed by Lee & Associates and prospective tenant will receive a copy of their credit results within 24 hours.
3. Based on the results of the credit check and criminal background check negotiations by the agent/broker will determine the lease structure.
4. Upon acceptance of the prospective tenant, the following mandatory lease documents will be executed:
  - Lease
  - Lee Acceptance and Statement of Premises, Area and Term
  - Executed Lease/ Exhibits:
    - Property Information Sheet:
    - Lee ADA/Hazardous Materials Disclosure
    - Lee Uniform Disclaimer Form
    - Lease Guarantee
    - Tenant Emergency Sheet
    - Move-In/Out Sheet with Pictures
    - Key Receipt
    - Insurance Certificate naming us and owner as additional insured
    - Business License
    - Certificate of Occupancy
    - Copies of Driver License and Social Security Card
5. The mandatory documentation is submitted to the owner by the agent for signature.
6. Tenant arranges for move in.
7. Tenant signs key receipt and obtains all keys, including mail box keys, associated with the lease

All the above will be provided by the commercial real estate agent.



# TENANT CREDIT INFORMATION

AGENTS NAME \_\_\_\_\_

PROPERTY ADDRESS: \_\_\_\_\_

TENANT NAME: \_\_\_\_\_  
(FIRST) (MIDDLE) (LAST)

NAME OF COMPANY: \_\_\_\_\_

CURRENT BUSINESS ADDRESS: \_\_\_\_\_

CURRENT BUSINESS TELEPHONE: \_\_\_\_\_

PROPRIETORSHIP  PARTNERSHIP  CORPORATION  OTHER

STATE WHERE INCORPORATED: \_\_\_\_\_

NAME(S) OF PRINCIPAL(S): \_\_\_\_\_  
\_\_\_\_\_

PROPOSED USE OF THE PREMISES: \_\_\_\_\_

CURRENT LANDLORD: \_\_\_\_\_

ADDRESS/TELEPHONE \_\_\_\_\_

**VITAL INFORMATION: (Please fill in entirely, including information on all, Sole Proprietors, Partners of a Partnership, and Corporate Officers. If additional space is required, please attach an additional sheet.)**

1 Name/Title: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Home Address: \_\_\_\_\_ Time at this Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Social Security #: \_\_\_\_\_ Drivers Lic. #/State: \_\_\_\_\_

2 Name/Title: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Home Address: \_\_\_\_\_ Time at this Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Social Security #: \_\_\_\_\_ Drivers Lic. #/State: \_\_\_\_\_

IF INCORPORATED, PLEASE LIST REGISTERED AGENT:

NAME: \_\_\_\_\_ TELEPHONE: \_\_\_\_\_

ADDRESS/CITY/STATE: \_\_\_\_\_  
\_\_\_\_\_

## FINANCIAL INFORMATION

**CHECKING ACCOUNT:** (Please list all additional checking accounts, both **PERSONAL** and Company, on a separated sheet including all the information requested.)

### BANK REFERENCES

1. BANK NAME & BRANCH: \_\_\_\_\_ ACCT. NO.: \_\_\_\_\_  
 CONTACT PERSON: \_\_\_\_\_  
 STREET: \_\_\_\_\_ PRESENT BALANCE: \_\_\_\_\_  
 CITY: \_\_\_\_\_ DATE OPENED: \_\_\_\_\_  
 STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_ TELEPHONE: \_\_\_\_\_
2. BANK NAME & BRANCH: \_\_\_\_\_ ACCT. NO.: \_\_\_\_\_  
 CONTACT PERSON: \_\_\_\_\_  
 STREET: \_\_\_\_\_ PRESENT BALANCE: \_\_\_\_\_  
 CITY: \_\_\_\_\_ DATE OPENED: \_\_\_\_\_  
 STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_ TELEPHONE: \_\_\_\_\_

Financial Statements Attached: Yes  No

Tax Returns (two most recent years) Attached: Yes  No

### SOURCES OF INCOME

Base Salary: \$ \_\_\_\_\_ Bonus & Commissions: \$ \_\_\_\_\_

Other Sources: \$ \_\_\_\_\_

TOTAL INCOME FROM PREVIOUS YEAR: \$ \_\_\_\_\_

### ASSETS

### LIABILITIES AND NETWORTH

Cash on Hand and in Banks	\$ _____	Notes Payable to Banks	\$ _____
U.S. Government Securities	\$ _____	Notes Payable to Relatives	\$ _____
Accounts, Loans & Notes Receivable	\$ _____	Accounts & Notes Payable to Others	\$ _____
Cash Surrender Value Life Ins.	\$ _____	Rents and Interest Due	\$ _____
Other Stocks & Bonds	\$ _____	Taxes Due	\$ _____
	\$ _____	Liens on Real Estate	\$ _____
Automobiles – No. ( )	\$ _____		\$ _____
Real Estate	\$ _____		\$ _____
	\$ _____	Other Liabilities (Itemize)	\$ _____
Other Assets (Itemize)	\$ _____		\$ _____
	\$ _____		\$ _____
	\$ _____		\$ _____
<b>TOTAL ASSETS (A)</b>	<b>\$ _____</b>	<b>TOTAL LIABILITIES (B)</b>	<b>\$ _____</b>

**NET WORTH (A – B) \$ \_\_\_\_\_**

## PERSONAL INFORMATION

### AUTOMOBILES OWNED

Make/Year/Model: \_\_\_\_\_ License #: \_\_\_\_\_

Loan Amount: \_\_\_\_\_ Lender: \_\_\_\_\_ Approx. Value: \_\_\_\_\_

### REAL ESTATE – HOME MORTGAGE (If more than one property is owned, please list properties on a separate sheet, including all information requested)

Mortgage Holder: \_\_\_\_\_

Property Address: \_\_\_\_\_

Approximate Property Value: \_\_\_\_\_ Payment: \_\_\_\_\_

Date Property Purchased: \_\_\_\_\_

### MISCELLANEOUS INFORMATION

Are you a comaker, endorser, or guarantor on any loan or contract? Yes  No

If yes, for Whom? \_\_\_\_\_ To Whom? \_\_\_\_\_

Are there any unsatisfied judgments against you? Yes  No  Amount \$ \_\_\_\_\_

If yes, to Whom owed? \_\_\_\_\_

Have you been declared bankrupt in the last 14 years? Yes  No

If yes, where? \_\_\_\_\_ Year \_\_\_\_\_

### EMERGENCY CONTACTS

1. \_\_\_\_\_ Telephone: \_\_\_\_\_

2. \_\_\_\_\_ Telephone: \_\_\_\_\_

Per the Consumer Credit Reporting Agencies Act, we are hereby required to provide you with the following statements based on your credit report:

- The decision to lease the above referenced unit(s) was based partly or entirely on information in the credit report attached.
- You will receive a copy of your credit report. Should you have any questions or to dispute the accuracy or completeness of the information in the credit report, please contact the credit reporting agency.
- Credit reporting agency: Credit Technology Inc.  
1990 E. La Cadena Drive  
Riverside, CA 92501  
(888) 778-1501

**THE REPRESENTATIONS OF FACT CONTAINED IN THIS APPLICATION ARE CONSIDERED PART OF THE LEASE AND ARE TRUE AND CORRECT. IF ANY INFORMATION HEREIN CONTAINED IS DISCOVERED TO BE FALSE OR MISLEADING, THE LEASE MADE ON THE STRENGTH OF THIS APPLICATION MAY, AT THE OPTION OF THE LANDLORD, BE TERMINATED AT ANY TIME. ADDITIONALLY, THE LANDLORD AND/OR LEE & ASSOCIATES COMMERCIAL REAL ESTATE SERVICES IS HEREBY GRANTED PERMISSION TO VERIFY ALL CREDIT/PERSONAL INFORMATION AND TO OBTAIN ANY CREDIT REPORTS DEEMED NECESSARY.**

**THIS COMPANY COOPERATES WITH LAW ENFORCEMENT WHEN INFORMATION IS REQUESTED. BY SIGNING THIS DOCUMENT, YOU AGREE TO ALLOW LEE & ASSOCIATES TO RELEASE PERSONAL INFORMATION TO LAW ENFORCEMENT AGENCIES WHEN REQUESTED.**

**THE UNDERSIGNED HAS READ THE FOREGOING AND ACKNOWLEDGES RECEIPT OF A COPY.**

1. SIGNATURE: \_\_\_\_\_  
NAME PRINTED: \_\_\_\_\_  
DATE: \_\_\_\_\_
2. SIGNATURE: \_\_\_\_\_  
NAME PRINTED: \_\_\_\_\_  
DATE: \_\_\_\_\_

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This information has been furnished by the applicant. LEE & ASSOCIATES Commercial Real Estate Services has made no attempt to verify this information nor the accuracy thereof.

# TENANT EMERGENCY INFORMATION FORM

*In order to maintain accurate files and records, please assist us by completing this form and returning it to our office immediately.*

## BUSINESS INFORMATION

Business Name: \_\_\_\_\_  
Business Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Business Phone #: \_\_\_\_\_ Fax: \_\_\_\_\_  
Cell: \_\_\_\_\_ Email: \_\_\_\_\_

## OWNER INFORMATION

Owner's Name: \_\_\_\_\_  
Owner's Home Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Home Phone #: \_\_\_\_\_ Fax: \_\_\_\_\_  
Cell: \_\_\_\_\_ Email: \_\_\_\_\_

## MANAGER INFORMATION

Manager's Name: \_\_\_\_\_  
Manager's Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Home Phone #: \_\_\_\_\_ Fax: \_\_\_\_\_  
Cell: \_\_\_\_\_ Email: \_\_\_\_\_

Mailing Correspondence: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

**MUST PROVIDE COPIES OF DRIVER LICENSE AND SOCIAL SECURITY CARD.  
PLEASE BE PROMPT IN THIS MATTER!**