



# Commercial Tenant/Buyer Requirements



Attention: **Julian Jackson**

Phone: 210-421-0303

Email: [julian@copernicusrealtyllc.com](mailto:julian@copernicusrealtyllc.com)

Referred By: \_\_\_\_\_

Office Use Only:	Subject Property Call On:		
Initial Appointment set for:	Day:	Date:	Time:
Location of meeting:			

Clients First Name, M.I, Last Name:


Phone:

\_\_\_\_\_ Cell Phone

\_\_\_\_\_ Home Phone

\_\_\_\_\_ Work Phone

Email: \_\_\_\_\_

1. Are you looking to lease or purchase a property? Lease \_\_\_\_\_ Purchase \_\_\_\_\_
2. Are you working with any other brokers at this time? \_\_\_\_\_
3. Type of commercial/luxury space?  
\_\_\_\_ Office/Medical \_\_\_\_ Retail \_\_\_\_ Industrial/Warehouse \_\_\_\_ Automotive \_\_\_\_ Investment \_\_\_\_ Land \_\_\_\_ Self  
Storage \_\_\_\_ Multi-family \_\_\_\_ Business/Franchise \_\_\_\_ Luxury home
4. Type of business/ Time in Business? \_\_\_\_\_ / \_\_\_\_\_
5. What is your monthly purchase/lease budget? \$ \_\_\_\_\_
6. Square footage desired? \_\_\_\_\_
7. Ideal location? \_\_\_\_\_
8. Do you have any special needs? - Ceiling height, ADA restrooms, parking,  
etc... \_\_\_\_\_
9. What time frame are you looking to purchase or lease? \*30/60/90+ days \_\_\_\_\_
10. Are you currently in a lease? When is it up? \_\_\_\_\_ / \_\_\_\_\_
11. Reason for relocating? \_\_\_\_\_
12. If purchase, how much money available for a down payment? \$ \_\_\_\_\_
13. Would you consider a lease option? Yes \_\_\_\_\_ No \_\_\_\_\_
14. Would you like to include financing for equipment or other materials? \_\_\_\_\_
15. Do you have property you would consider selling? Yes/ No \_\_\_\_\_

**Agent Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

I understand that I must be a licensed real estate agent in the state of Texas to receive a referral fee on any transaction completed from this contact.

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[www.sacommercialrealestate.com](http://www.sacommercialrealestate.com)

## Commercial Leasing Checklist

\_\_\_\_\_ Consultation

Location Demographics  
Cost & Revenue Projections  
Lease Terms & Structure

\_\_\_\_\_ Complete Lease Application and Financial Statement

Credit requirements  
Personal Guaranty

\_\_\_\_\_ Define your requirements

\_\_\_\_\_ Locate suitable property

\_\_\_\_\_ Tour properties

\_\_\_\_\_ Prepare/Present a letter of intent (LOI)

\_\_\_\_\_ Response to LOI

\_\_\_\_\_ Negotiate the lease contract

\_\_\_\_\_ Closing Plans

Client: \_\_\_\_\_  
Date Started with client: 28-Jun

Phone: \_\_\_\_\_  
Move by 1-Feb

Cell: \_\_\_\_\_

Glass doctor

Business concept/requirements: \_\_\_\_\_

Areas Searched: 78251 zip

Type Space: rd/Flex/Retail

Approximate Spaces Available:	21
Total met concept/req:	
Sent:	
Selected:	
Toured:	0
Offers on:	

Property signed lease on: \_\_\_\_\_

Property	Zip	Type	Neighborhood	Avail. Sq ft	Price/Sqft	Lease Type	Cost	Monthly
7616 Culebra Rd	78251	Retail	Crown meadow	4100	\$1.33	NNN	\$0.00	\$5,453.00
7914 Culebra	78251	Retail	Crown Point	1800	\$1.00	NNN	\$0.33	\$2,394.00
9702 Potranco	78251	Retail	Potranco Point	1200	\$0.75	MG	\$0.19	\$1,128.00
12500 Network Blvd	78249	Flex	University Business Park	1945	\$1.17	NNN	\$0.29	\$2,839.70
5407 Bandera	78238	Flex	West Loop II	2300	\$0.60	NNN	\$0.19	\$1,817.00
Poss Rd	78238	Flex		3000	\$0.77	gross	\$0.00	\$2,295.00

# Tenant Requirement

## **San Antonio Brokers,**

CR - Commercial is pleased to represent an experienced automotive dealer client that is seeking to **Lease** Commercial Space.

### **REQUIREMENT criteria:**

**Size:** Ability to hold 20-40 cars

**Use:** Automotive Sales and Limited Repairs

**Timing:** Immediately

### **Open to:**

- Properties in between Hwy 410 and 1604 from 151 up to Vance Jackson

*As always, you will be protected on all pocket listings.*

Please email prospective offerings to:

## **Julian Jackson**

Director of Commercial Realty

Copernicus Realty, LLC

**210.421.0303**

[julian@copernicusrealtyllc.com](mailto:julian@copernicusrealtyllc.com)



**Please Visit Us At:**

**[WWW.SACOMMERCIALREALESTATE.COM](http://WWW.SACOMMERCIALREALESTATE.COM)**

12030 Bandera Rd | Suite 110 | Helotes | Texas | 78023





## Information About Brokerage Services

Texas law requires all real estate license holders to give the following information about brokerage services to prospective buyers, tenants, sellers and landlords.

### TYPES OF REAL ESTATE LICENSE HOLDERS:

- **A BROKER** is responsible for all brokerage activities, including acts performed by sales agents sponsored by the broker.
- **A SALES AGENT** must be sponsored by a broker and works with clients on behalf of the broker.

### A BROKER'S MINIMUM DUTIES REQUIRED BY LAW (A client is the person or party that the broker represents):

- Put the interests of the client above all others, including the broker's own interests;
- Inform the client of any material information about the property or transaction received by the broker;
- Answer the client's questions and present any offer to or counter-offer from the client; and
- Treat all parties to a real estate transaction honestly and fairly.

### A LICENSE HOLDER CAN REPRESENT A PARTY IN A REAL ESTATE TRANSACTION:

**AS AGENT FOR OWNER (SELLER/LANDLORD):** The broker becomes the property owner's agent through an agreement with the owner, usually in a written listing to sell or property management agreement. An owner's agent must perform the broker's minimum duties above and must inform the owner of any material information about the property or transaction known by the agent, including information disclosed to the agent or subagent by the buyer or buyer's agent.

**AS AGENT FOR BUYER/TENANT:** The broker becomes the buyer/tenant's agent by agreeing to represent the buyer, usually through a written representation agreement. A buyer's agent must perform the broker's minimum duties above and must inform the buyer of any material information about the property or transaction known by the agent, including information disclosed to the agent by the seller or seller's agent.

**AS AGENT FOR BOTH - INTERMEDIARY:** To act as an intermediary between the parties the broker must first obtain the written agreement of *each party* to the transaction. The written agreement must state who will pay the broker and, in conspicuous bold or underlined print, set forth the broker's obligations as an intermediary. A broker who acts as an intermediary:

- Must treat all parties to the transaction impartially and fairly;
- May, with the parties' written consent, appoint a different license holder associated with the broker to each party (owner and buyer) to communicate with, provide opinions and advice to, and carry out the instructions of each party to the transaction.
- Must not, unless specifically authorized in writing to do so by the party, disclose:
  - that the owner will accept a price less than the written asking price;
  - that the buyer/tenant will pay a price greater than the price submitted in a written offer; and
  - any confidential information or any other information that a party specifically instructs the broker in writing not to disclose, unless required to do so by law.

**AS SUBAGENT:** A license holder acts as a subagent when aiding a buyer in a transaction without an agreement to represent the buyer. A subagent can assist the buyer but does not represent the buyer and must place the interests of the owner first.

### TO AVOID DISPUTES, ALL AGREEMENTS BETWEEN YOU AND A BROKER SHOULD BE IN WRITING AND CLEARLY ESTABLISH:

- The broker's duties and responsibilities to you, and your obligations under the representation agreement.
- Who will pay the broker for services provided to you, when payment will be made and how the payment will be calculated.

**LICENSE HOLDER CONTACT INFORMATION:** This notice is being provided for information purposes. It does not create an obligation for you to use the broker's services. Please acknowledge receipt of this notice below and retain a copy for your records.

_____ Licensed Broker /Broker Firm Name or Primary Assumed Business Name	_____ License No.	_____ Email	_____ Phone
_____ Designated Broker of Firm	_____ License No.	_____ Email	_____ Phone
_____ Licensed Supervisor of Sales Agent/ Associate	_____ License No.	_____ Email	_____ Phone
_____ Sales Agent/Associate's Name	_____ License No.	_____ Email	_____ Phone

\_\_\_\_\_  
Buyer/Tenant/Seller/Landlord Initials

\_\_\_\_\_  
Date

Copernicus Realty, LLC  
12030 Bandera Rd Suite 110  
San Antonio, TX 78023  
Office: 210-521-7900 Fax: 210-521-8539

## INVOICE

**ATTN:** \_\_\_\_\_

DATE		TOTAL DUE
<input type="text"/>	Leasing Commission	<input type="text"/>
MLS#:	<input type="text"/>	
ADDRESS:	<input type="text"/>	
RENT: \$	<input type="text"/>	
LISTING AGENT:	<input type="text"/>	
SELLING AGENT:	<input type="text"/>	
CLIENT(S):	<input type="text"/>	
CLOSING DATE:	<input type="text"/>	
B/C: \$	<input type="text"/>	
<b>Please pay this amount:</b>		<b>\$</b> <input type="text"/>

**PLEASE MAKE CHECKS PAYABLE TO:**

**COPERNICUS REALTY, LLC**

**RE:**

THIS INVOICE IS DUE AND PAYABLE UPON RECEIPT - Thank you!

## Request for Taxpayer Identification Number and Certification

Give Form to the  
 requester. Do not  
 send to the IRS.

Print or type See Specific Instructions on page 2.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>Northwest Real Estate, LLC</b>		
	2 Business name/disregarded entity name, if different from above		
	3 Check appropriate box for federal tax classification; check only one of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input checked="" type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <b>Note.</b> For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner. <input type="checkbox"/> Other (see instructions) ▶ _____		4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
	5 Address (number, street, and apt. or suite no.) <b>12030 Bandera #110</b>		Requester's name and address (optional)
	6 City, state, and ZIP code <b>Helotes, TX 78023</b>		
	7 List account number(s) here (optional)		

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

**Note.** If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Social security number										
or										
Employer identification number										
7	4		2	4	4	8	1	2	2	

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶ <b>1 JAN 2014</b>
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**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at [www.irs.gov/fw9](http://www.irs.gov/fw9).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding? on page 2.*

By signing the filled-out form, you:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
- Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.

