

[illegible]

Commercial Tenant/Buyer Requirements



Attention: **Julian Jackson**

Phone: **210-421-0303**

Email: **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.

FOR ALL YOUR COMMERCIAL REAL ESTATE NEEDS VISIT US

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



Please Visit Us At:

WWW.SACOMMERCIALREALESTATE.COM

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

SCORECARD



COMMERCIAL
Copernicus Realty, LLC

PROPERTY #1

NEGOTIATION TIPS:

LET THEM KNOW YOU HAVE A TENANT REP
DON'T EXPRESS HOW MUCH YOU LIKE THE SPACE
POINT OUT THE THINGS YOU DON'T LIKE
THERE IS ONLY ONE OTHER SPACE YOU ARE LOOKING AT
YOU WILL HAVE YOUR BROKER SUBMIT THE PROPOSAL
LET THEM KNOW FIRST TERM OF LEASE 3 YEARS WITH RENEWALS

QUESTIONS:

HOW MANY SQUARE FT
TYPE LEASE - GROSS, MODIFIED GROSS, NNN
ANY ADDITIONAL COST FOR UTILITIES
IF NOT GROSS ADDITIONAL COST PER SF
PRICE PER SF
TOTAL MONTHLY COST
IDEAL LOCATION
TRAFFIC COUNT
SIGNAGE
TENANT IMPROVEMENT ALLOWANCE
DO YOU HAVE A TEAM TO DO THE WORK
HOW MUCH PARKING
HOW MUCH FREE RENT IS THE LANDLORD OFFERING
PERSONAL FEEL ABOUT PROPERTY
24 HOUR ACCESS
ANY DRAW BACKS

Property Address:

Agent(s):

NOTE:

WILL NOT LIKELY PROVIDE FREE RENT AND TENANT IMPROVEMENT

Notes

5 - BEST
SCORE
1 - 5

PROPERTY #2

NEGOTIATION TIPS:

LET THEM KNOW YOU HAVE A TENANT REP
DON'T EXPRESS HOW MUCH YOU LIKE THE SPACE
POINT OUT THE THINGS YOU DON'T LIKE
THERE IS ONLY ONE OTHER SPACE YOU ARE LOOKING AT
YOU WILL HAVE YOUR BROKER SUBMIT THE PROPOSAL
LET THEM KNOW FIRST TERM OF LEASE 3 YEARS WITH RENEWALS

QUESTIONS:

HOW MANY SQUARE FT
TYPE LEASE - GROSS, MODIFIED GROSS, NNN
ANY ADDITIONAL COST FOR UTILITIES
IF NOT GROSS ADDITIONAL COST PER SF
PRICE PER SF
TOTAL MONTHLY COST
IDEAL LOCATION
TRAFFIC COUNT
SIGNAGE
TENANT IMPROVEMENT ALLOWANCE
DO YOU HAVE A TEAM TO DO THE WORK
HOW MUCH PARKING
HOW MUCH FREE RENT IS THE LANDLORD OFFERING
PERSONAL FEEL ABOUT PROPERTY
24 HOUR ACCESS
ANY DRAW BACKS

Property Address:

Agent(s):

NOTE:

WILL NOT LIKELY PROVIDE FREE RENT AND TENANT IMPROVEMENT

Notes

5 - BEST
SCORE
1 - 5

PROPERTY #3

NEGOTIATION TIPS:

LET THEM KNOW YOU HAVE A TENANT REP
DON'T EXPRESS HOW MUCH YOU LIKE THE SPACE
POINT OUT THE THINGS YOU DON'T LIKE
THERE IS ONLY ONE OTHER SPACE YOU ARE LOOKING AT
YOU WILL HAVE YOUR BROKER SUBMIT THE PROPOSAL
LET THEM KNOW FIRST TERM OF LEASE 3 YEARS WITH RENEWALS

QUESTIONS:

HOW MANY SQUARE FT
TYPE LEASE - GROSS, MODIFIED GROSS, NNN
ANY ADDITIONAL COST FOR UTILITIES
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Property Address:

Agent(s):

NOTE:

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Notes

5 - BEST
SCORE
1 - 5



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"/>

Please pay this amount: \$

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. Northwest Real Estate, LLC		
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"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ Note. 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) _____ (Applies to accounts maintained outside the U.S.)	
5 Address (number, street, and apt. or suite no.) 12030 Bandera #110	Requester's name and address (optional)	
6 City, state, and ZIP code Helotes, TX 78023		
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

Part II Certification

Under penalties of perjury, I certify that:

1. 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
2. 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
3. I am a U.S. citizen or other U.S. person (defined below); and
4. 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.

Sign Here	Signature of U.S. person ▶ 	Date ▶ 1 JAN 2016
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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.

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:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. 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
4. 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.

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