



CEI Capital

CCML ASSET MANAGEMENT SITE VISIT FORM

I. Overview

Site Visit Date _____

Asset Name _____ CCML Asset Number _____

QALICB Name _____

Street Address _____

City _____ State _____ Zip _____

Property Manager's Name _____
(or individual at site responding to CCML Asset Manager's questions)

Property Manager's phone number _____ Property Manager's email address: _____

CCML Rep. conducting site visit _____ Working Partner (if applicable): _____

II. Property

Brief description: _____

	Type	Square Footage	Units
Mixed Use			
Commercial/Retail			
Hotel / Motel			
Community Facility			
Timberlands			(acres)
Manufacturing			
Historic Tax Credit			
Other			

Additional Comments: (if needed) _____

III. Construction

If under construction:

Percent complete: _____ On schedule? _____

Expected date of completion: _____

Issues/concerns regarding construction? Market?, Etc.?

1. _____

2. _____

3. _____

IV. Operating Business

If complete or stabilized, identify any issues or concerns regarding actual versus budget, leasing, market, property management company, capital expenditures, deferred maintenance, etc.?

1. _____

2. _____

3. _____

V. Summary of leasing/sales activities (if applicable)%

Total Number of units _____

Leased to date _____

Leasing/Sales activity Ahead of expectations _____ As expected _____ Slower than expected _____

Pricing Above expectations _____ As expected _____ Below expectations _____

Additional Comments if Needed:



VI. Inspection of Property

Based on your visit identify any areas of concern regarding the physical condition of the asset.

Needed Repairs / Comments

Roof	_____
Building Exterior (incl. windows)	_____
Patio / Balcony	_____
Clubhouse/pool/amenities	_____
Common Areas	_____
Landscaping	_____
Site Drainage	_____
Parking / Paving	_____
Sidewalks	_____
Equipment	_____
Other	_____

Are there any issues or concerns regarding the asset that were either identified, illuminated or resolved during the visit?

1 _____

2. _____

3 _____

VII. Miscellaneous issues or concerns not addressed above?

1. _____

2. _____

3. _____

Other. _____

VIII. Site Visit Summary

Follow up items to be resolved:

1. _____

2. _____

3. _____

Other. _____

IX. Site Visit Photos

If available, please attach photos from the site visit.

Yes, photos are attached _____

No, photos are not attached _____