

Commercial Tenant Intake Packet

Prepared for Prospective Commercial Tenants – California

This packet must be completed prior to scheduling a strategy meeting. Completion does not create an agency relationship. Representation begins only upon execution of a written tenant representation agreement.

A. Business Identification

Legal Business Name:

Entity Type (LLC / Corp / Partnership / Sole Proprietor):

State of Formation:

Years in Operation:

Business License Number(s):

Primary Contact Name & Title:

Phone / Email:

B. Financial Readiness (Acknowledgment)

Please confirm availability of the following (as applicable):

- Last 2–3 years business tax returns
- Current Year-to-Date Profit & Loss Statement
- Balance Sheet (if available)
- Bank reference or proof of funds (if requested)
- Acknowledgment that personal guarantees may be required

Tenant Initials: _____

C. Space Requirements (Tenant-Prepared)

Intended Use:

Target Square Footage (Min / Max):

Desired Lease Term Range:

Target Monthly Rent Range (Base Rent):

Parking / Access Requirements:

Special Requirements (power, loading, HVAC, zoning):

Target Occupancy Date:

D. Decision-Maker Disclosure

Please list all individuals with authority to approve lease terms and execute agreements.

Name / Role / Authority Level:

■ All decision makers are aligned with the stated leasing objective.

Authorized Signatory: _____ Date: _____

Pre-Conversation Disclosure & Acknowledgment

Under California law, a commercial real estate broker does not represent a tenant unless and until a written tenant representation agreement is executed. Prior to such agreement, any discussion is preliminary, non-confidential, and informational only.

■ I confirm that I have NOT signed a tenant representation agreement with another broker.

■ I HAVE signed a tenant representation agreement with another broker (details required):

Broker Name: _____

Agreement Type: _____

Expiration Date: _____

Prospective Tenant Name: _____

Signature: _____ Date: _____