



Prospect Questionnaire – Economic and Fiscal Impact Analysis

Note: To objectively evaluate the economic and fiscal impact that your company may have on the City of Carrollton and other public entities, the Carrollton Economic Development office will review and evaluate specific information related to your project. Your assistance in providing the referenced information is respectfully requested. Please complete the questions below and email a completed copy of this form to jenny.mizutowicz@cityofcarrollton.com. Call 972.466.5741 should you have any questions or need assistance. Thank you!

Date: _____

A. Basic Company Information:

1. Company Name: _____
2. Person to contact concerning this questionnaire: _____
3. Address: _____ Phone: _____
_____ Fax: _____
Email: _____ Company website: _____
4. Ownership (check one): _____ Public Traded Stock or _____ Privately Held
5. Form of Business (check one): ___ Corporation ___ Joint Venture ___ Partnership ___ Sole Proprietorship
6. How long has the company been in operation? _____ Years
7. Is this a new business start-up? Yes / No

Please attach to this Questionnaire the company's financial statements for the preceding 3-year period

B. Company Business Activities:

8. NAICS code: _____
9. Describe the company's principal business (*attach additional sheets as necessary*):

10. Describe the specific operations to be performed at the proposed Carrollton facility:

C. Company's Proposed Facility:

11. Describe the company's plans for expanding or locating in Carrollton
(attach additional sheets as necessary):

12. Area (Square Feet) Requirements:

- (a) Office _____ SF
(b) Manufacturing: _____ SF
(c) Warehouse: _____ SF
(d) Showroom/Retail _____ SF
(e) Other: _____ SF

Total Area (a+b+c+d+e): _____ SF

13. Is the company expanding its existing local operations or relocating its operations from somewhere else to our area? (check one) _____ Expansion _____ Relocation _____

14. Does the company plan to lease or own the facility?
(check one) _____ Lease _____ Own _____

15. If the company is planning to lease space in Carrollton, what is the lease term? _____

16. Will the facility be built or does the facility already exist?
(check one) _____ New _____ Existing _____

17. If the company is occupying an existing facility, what is the address? _____

18. If the company is constructing a new facility, what is the approximate location or address of the site?

19. If the company is constructing a new facility, what is the anticipated date for commencement of construction? _____

20. Anticipated date for company to move into the facility: _____

Please attach any applicable aerial maps, site plans, floor plans, architectural renderings or other such documents related to the proposed facility/site.

D. Capital Investment:

21. Initial and subsequent investments by the company in real and business personal property:

Instructions

- List only the additional capital investment made each year
- Only complete information for the number of years that you plan to lease the facility
- If you plan to own your facility, please include information for the full 10-year period

Year	Land	Buildings & Improvements	Furniture, Fixtures, & Office Equipment	Industrial Machines & Equipment	Total
1	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
2	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
3	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
4	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
5	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
6	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
7	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
8	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
9	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
10	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Total	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

22. Estimated total inventories in Carrollton at the end of each calendar year:

Year	
1	\$ _____
2	\$ _____
3	\$ _____
4	\$ _____
5	\$ _____
6	\$ _____
7	\$ _____
8	\$ _____
9	\$ _____
10	\$ _____

23. Projected annual inventory growth rate: _____ %

24. Estimated percentage of inventory that is exempt from taxation by Freeport: _____

E. Taxable Sales/Purchases

25. Will the company have significant taxable sales at its Carrollton facility (> \$500,000 annually)? _____

If you answered 'yes' to question 25, please complete questions 26-27

26. Projected annual sales volume of Carrollton-based operations (subject to state and local sales tax):

Year	
1	\$ _____
2	\$ _____

3	\$ _____
4	\$ _____
5	\$ _____
6	\$ _____
7	\$ _____
8	\$ _____
9	\$ _____
10	\$ _____

27. Will Carrollton be designated as the “point of sale” for sales tax purposes? _____
28. Will the company make significant taxable purchases of equipment or other goods for which the first point of use will be the Carrollton facility? (> \$500,000 annually)? _____

If you answered ‘yes’ to question 28, please complete questions 29-30

29. Projected annual taxable purchases for the Carrollton-based operation (Subject to state and local sales tax):

<u>Year</u>	
1	\$ _____
2	\$ _____
3	\$ _____
4	\$ _____
5	\$ _____
6	\$ _____
7	\$ _____
8	\$ _____
9	\$ _____
10	\$ _____

30. Approximately what percentage of these purchases will be executed with suppliers located outside the State of Texas? _____ %
31. Will Carrollton be designated as the “point of delivery” of the “point of first use” for the purpose of collecting sales/use taxes of these purchases? _____
32. If the company is constructing a new facility, making significant upgrades to an existing facility, or expanding an existing facility, would the company be willing to require its contractors to bill the company under a ‘separated contract’ that allows the sales taxes paid on construction materials to be accrued to the City of Carrollton? _____

F. Employment and Payroll:

33. How many fulltime equivalent (FTE) positions will the company employ? _____
(If this is an existing company that is expanding in Carrollton, list only new employment positions)
34. What percentage of the projected employment positions would receive benefits? _____
35. New Employees to be hired each year (salaries *net* of benefits):

Instructions

- List only the additional employment positions created in Carrollton each year
- Only complete information for the number of years that you plan to lease the facility
- If you plan to own your facility, please include information for the full 10-year period

Year	Employees to be paid \$20,000/yr or less	Employees to be paid \$20,000 to \$29,999	Employees to be paid \$30,000 to \$49,999	Employees to be paid \$50,000 to \$99,999	Employees to be paid \$100,000 or greater	Total Number of Employees	Total Payroll Per Year
1	_____	_____	_____	_____	_____	_____	\$ _____
2	_____	_____	_____	_____	_____	_____	\$ _____
3	_____	_____	_____	_____	_____	_____	\$ _____
4	_____	_____	_____	_____	_____	_____	\$ _____
5	_____	_____	_____	_____	_____	_____	\$ _____
6	_____	_____	_____	_____	_____	_____	\$ _____
7	_____	_____	_____	_____	_____	_____	\$ _____
8	_____	_____	_____	_____	_____	_____	\$ _____
9	_____	_____	_____	_____	_____	_____	\$ _____
10	_____	_____	_____	_____	_____	_____	\$ _____
Total	_____	_____	_____	_____	_____	_____	\$ _____

36. Of the total employment positions to be located in Carrollton, please list the percentages of employment positions that will be (a) relocating from outside the area, (b) relocating from within the area, or (c) will be newly created positions:

	<u>Percentage</u>
a. Employment Positions Relocated from Outside of Texas:	_____
b. Employment Positions Relocated from within Texas, but Outside the Dallas-Fort Worth Area:	_____
c. Employment Positions Relocated Inside the Dallas-Fort Worth Area:	_____
d. New Employment Positions Created:	_____
Total:	100%

37. Average wage paid to employees to be located at the Carrollton facility: _____

NOTE: Texas State Law prohibits any tax-payer subsidized job creation grant or tax abatement be given to any business entity in Texas that is in violation of federal immigration law. Any agreement providing a public subsidy will include a provision for repayment of the public subsidy with interest in the event the business violates the federal code, 8 U.S.C. Section 1324a (f).

G. Other Economic Impact Considerations or Comments:

38. Please provide information regarding the company's past involvement in the local community, as well as the level of involvement the Company would have in Carrollton:

39. Include or describe any other information relative to the company's future economic and fiscal impact on the City of Carrollton, area school districts and county governments:

40. Is the company requesting a specific incentive and, if so, how will such incentive be used?

41. Is the company considering any other communities besides Carrollton? If appropriate to share, please specify which communities:

42. Has the company already entered into a contract or any form of agreement for the proposed project?
Yes / No

I hereby certify that the information included on this form is complete and accurate:

Signature: _____ Title: _____

Print Name: _____ Date: _____

Please Attach Any or All of the Following:

- Company Financial Statements for Preceding 3-Year Period (The City of Carrollton can sign a non-disclosure agreement, if necessary)
- Aerial maps, site plans, floor plans, architectural renderings, etc. for proposed facility

Other _____

Thank You!

The City of Carrollton Economic Development office appreciates your cooperation and assistance in providing the above information. This information will be helpful in determining your firm’s economic and fiscal impact on the City of Carrollton, county governments, the Dallas County Community College District, and area school districts. Please let us know if a non-disclosure agreement (NDA) should be signed.

Upon Completion of this Form: Please e-mail this completed questionnaire to **jenny.mizutowicz@cityofcarrollton.com**. If you have further questions, please contact us at **972.466.5741**.