

(1) You may Print this form and HANDWRITE in the blanks, then Scan and E-mail OR Fax to Hilda W. Allen.
OR

(2) You may TYPE in the blanks now, however, it will not electronically save and send with the data intact.

In order to send the form with your typed-in blanks, you MUST PRINT it after completing, then manually Scan & E-Mail or Fax.

Preliminary Business & Financial Questionnaire

General Information

Course Name _____

Course Address _____ City _____ State _____ Zip _____

Web Address _____ Course e-mail _____

Owner(s) _____

Owner Address _____ City _____ State _____ Zip _____

Form of Ownership _____

(ex. C Corporation, Limited Liability Co., Partnership, Proprietorship)

Are all assets, including land, held by this company? Yes (circle) No

If no, describe ownership structure -all companies/individuals and relationships

Management of property

A) Who has decision making authority where personnel and other expenses are concerned? _____

B) Who makes the decision about equipment ownership or lease? _____

C) Who prepares the annual budgets and fees? _____

D) Who approves the annual budget? _____

Financial Information

Revenues / Expenses at least one year (**Attach Income/Expense statement, preferably two years**)

Are audited statements available Yes (circle) No If Yes, what years? _____

Debt Secured: (RE) Long Term \$ _____ Short Term \$ _____

Secured: Equipment Long Term \$ _____ Short Term \$ _____

Unsecured: Long Term \$ _____ Short Term \$ _____

Annual Capital Expenditures _____

2018 Y-T-D Gross Income: _____

2017 Gross Income: _____

2016 Gross Income: _____

2015 Gross Income: _____

Any major projects or repairs scheduled in the next 12 months? Yes (circle) No

If yes, please list project and reason _____

Items affecting the Property Title

- Is property subject to a land lease, right of first refusal, or option to purchase?
Yes (circle) No
If yes, please explain _____
- Are there any unusual title restrictions or covenants? Yes (circle) No
If yes, please explain _____
- Are there any environmental concerns or challenges? _____
- Date of Environmental Phase I report _____
- Has a Phase II Environmental ever been done? _____ Date if Yes _____
- Date and type of last survey _____
- Does survey meet ALTA standards for title insurance? _____

Golf Rounds Stats

Golf Season Year round or Open seasonally approx. _____ to _____

Open _____ days a week Hours of operation of Golf Shop - From _____ am to _____ pm

Rounds played per year
(18 hole) equivalent 2015 _____ 2016 _____ 2017 _____ 2018 Y-T-D _____

Play distribution estimate = 100% Men _____ % Ladies _____ % Juniors _____ %

Current Greens Fees / player		2017	2018	2017	2018
In season:	Weekday	High _____ / _____	Low _____ / _____	Weekday	High _____ / _____
	Weekend	High _____ / _____	Low _____ / _____	Weekend	High _____ / _____
Off season:	Weekday	High _____ / _____	Low _____ / _____	Weekday	High _____ / _____
	Weekend	High _____ / _____	Low _____ / _____	Weekend	High _____ / _____

Current Cart Fees/player 2018: \$ _____ 2017: \$ _____

Range Fees – Small bucket \$ _____ Large bucket \$ _____ Annual unlimited range plan \$ _____

Check the following services and activities that are currently provided:

- | | | |
|---|-----------------------------|----------------------------|
| _____ PGA Professional | _____ Private golf lessons | _____ Group Clinics |
| _____ Playing Lessons | _____ Demo Clubs | _____ Shoe Service |
| _____ Golf Bag Loading | _____ Lockers | _____ Bag Tags |
| _____ Advanced Tee Times | _____ Member Events | _____ Outside Group Events |
| _____ Tournament/event planning, scoring, rules, awards | _____ GPS on carts | _____ Beverage Service |
| _____ Rental Clubs men | _____ Rental Clubs women | _____ Shoes |
| _____ Stocked Pro Shop | _____ Clubs, gloves & balls | _____ Junior golfer items |
| _____ Attire for Men | _____ Women’s items | |

How many club events are coordinated each year? _____ Men _____ Women _____ Juniors _____

How many outside outings are expected each year? _____ average attendance _____

Do you have any corporate league play that participates during the season? _____

Do you host any city, state or national events? _____ If yes, please include _____

Course Information

Architect _____ Type _____

(public, semi-private, private)

Location of Golf Course _____ Yr. Built _____

Nearest Metropolitan Area _____

Yardage from Championship Tees _____

Par _____ Slope _____ Rating _____

Total acreage of property _____ Turf Area _____

Is course part of a Development? Yes (circle) No

If yes, what is the level of quality and completion of the development?

What are the expansion possibilities for the course? _____

Is the course used for any type of other revenue activities when closed? Ie., cross country skiing

Practice Facilities

Range Yes (circle) No

Putting Green Yes (circle) No

Range Tee Capacity max # _____ hitting stations

Range Tee Surface grass _____ artificial _____ or both _____

Carts Paths Yes (circle) No are they Tee to Green Yes (circle) No

If not Tee to Green, please describe location and usage _____

Path Material Circle one: - Asphalt - Concrete - Other Width _____ ft age _____

Turf

Greens - Total # _____ Total sq footage _____

Tees - Total # on course including range tee top _____

Fairway - Total acreage for course and range _____

Rough - Total acreage mowed _____ other acreage not mowed _____

Turf Type - Greens _____ variety _____

Tees _____ variety _____

Fairways _____ variety _____

Roughs _____ variety _____

Course Standards

Mowing Frequency on average during season

Greens _____ times a week
Tees _____ times a week
Fairways _____ times a week
Roughs _____ times a week
Rake bunkers _____ times a week

Ride or Walk Mow _____
Ride or Walk Mow _____

Hand rake or Machine _____

Course Specifics

- Total bunkers on the course- _____ Do the bunkers have liners underneath? Yes or No
- Were the greens built to USGA specifications? _____
- Water Source _____
- Gallon usage for current and prior year _____
- If purchased, average annual cost past 3 years \$ _____
- Water contracts or permits, if not perpetual source Yes (circle) No
If yes, please explain _____
- Do you use any affluent or grey water on the course – Yes (circle) No
If yes, please explain arrangement _____
- Storm Water Drainage System Yes (circle) No
Please list number of Lakes _____ Creeks _____ Rivers _____
- Are the lakes, ponds, etc under professional water management care? Yes (circle) No
- Is any portion of the golf course in a flood plain? Yes (circle) No
If yes, please explain _____
- Does the course have environmental sensitive “no play zones” inside the property boundaries? Yes (circle) No

Irrigation System

- a) Automatic (circle one) Manual None
- b) Valve in Head (circle one) Block Valve Quick Coupler
- c) Coverage – single row – double row - both

Manufacturer and model of equipment

Heads _____ # of heads _____
Satellites _____ # of Satellites _____
Central _____

Describe age, capacity, manufacture and condition of pumps and if maintenance is under contract

Club Amenities & Buildings

Clubhouse Facility

Permanent (circle) Temporary

Sq. footage _____ Type _____
(wood, brick, stucco, etc.)
Date Built _____ # of Stories _____
Banquet / Outing Capability _____ # seats _____
Kitchens # of _____ Sq footage _____
Golf Shop retail sq footage _____ Office space Sq footage _____
Pool _____ Fitness _____ Spa _____ Other _____

Cart Storage Facility

Permanent (circle) Temporary

Sq. footage _____ Type _____
(under clubhouse, separate, open w/roof, open)
Date Built _____ Cart Capacity _____
of Carts _____ Owned (circle) Leased
Name Brand of Fleet _____ Electric (circle) Gas Age _____

Maintenance Building

Permanent (circle one) Temporary None

Sq. footage _____ Type _____
(wood, brick, steel, etc.)
Date Built _____

Other Buildings

	yes or no	Description
Pump house	_____	_____
Starter's booth	_____	_____
Half-way house	_____	_____
On course restrooms	_____	_____
Chemical storage buildings	_____	_____
Other _____	_____	_____

MARKETING & MEMBERSHIP INFORMATION

What do you consider your market and why? _____

Number of courses in market with comparable rates Public _____
 Private _____
 Semi-Private _____

Names and Fees of competitive courses in area	PEAK GREEN FEE W/cart	Annual Rounds
1. _____	\$ _____	_____
2. _____	\$ _____	_____
3. _____	\$ _____	_____

If memberships are available, describe _____

Are memberships limited? _____ If yes – What are limits? _____

How many are sold today? _____

What is your net membership increase or decrease the last 3 years?

2017 _____
 2016 _____
 2015 _____

What are Clubs Dues associated with membership?	2018	2017	2016
Family	\$ _____	\$ _____	\$ _____
Corporate	\$ _____	\$ _____	\$ _____
Single	\$ _____	\$ _____	\$ _____
Junior	\$ _____	\$ _____	\$ _____

What is the Initiation Fee ?	Family	\$ _____	\$ _____
	Corporate	\$ _____	\$ _____
	Single	\$ _____	\$ _____
	Junior	\$ _____	\$ _____

Is all or part of the initiation fee refundable? _____ If yes – how much? _____

Do you have any reciprocal arrangements with other clubs? If yes, please include arrangements

Are there Assessments? Yes (circle) No

If yes, describe timing, amount and purpose of last 2 assessments

1. _____ \$ _____

2. _____ \$ _____

Are there minimums? Yes (circle) No

If yes, please explain _____

Please check all that apply

- Web site for players _____
- Internet tee times _____
- Fee & Membership promotional handouts _____
- Discount coupons _____
- Do you advertise in the Newspaper _____ TV _____ Radio _____ Course Guides _____
- Sell Course yardage books _____
- Monthly Club newsletter _____
- Reward programs for those that bring players or new members to the Club? _____

Have you ever surveyed the players? Yes (circle) No

Other Club services – Please check all that apply

____ Breakfast ____ Lunch ____ Dinner ____ Grill/snack bar
____ Catered functions ____ Swim Lessons ____ Fitness Lessons ____ Business Meetings
____ Bridge/cards