



**Hilda W. Allen**  
real estate, inc.

## 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 three 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 \_\_\_\_\_

2022 Y-T-D Gross Income: \_\_\_\_\_

2021 Gross Income: \_\_\_\_\_

2020 Gross Income: \_\_\_\_\_

2019 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 2019 \_\_\_\_\_ 2020 \_\_\_\_\_ 2021 \_\_\_\_\_ 2022 Y-T-D \_\_\_\_\_

Play distribution estimate = 100% Men \_\_\_\_\_ % Ladies \_\_\_\_\_ % Juniors \_\_\_\_\_ %

Current Greens Fees / player		2021	2022	2021	2022
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 2022: \$ \_\_\_\_\_ 2021: \$ \_\_\_\_\_

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         |
| _____ Rental Clubs men                                  | _____ Rental Clubs women    | _____ Beverage Service     |
| _____ Stocked Pro Shop                                  | _____ Clubs, gloves & balls | _____ Shoes                |
| _____ Attire for Men                                    | _____ Women’s items         | _____ Junior golfer 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 \_\_\_\_\_



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### Course Information

Architect \_\_\_\_\_ Type \_\_\_\_\_  
(public, semi-private, private)

Location of Golf Course \_\_\_\_\_ Yr. Built \_\_\_\_\_

Nearest Metropolitan Area \_\_\_\_\_

Yardage from Championship Tees \_\_\_\_\_

No. of Holes \_\_\_\_\_ 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 \_\_\_\_\_



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### 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

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### 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 _____	_____	_____



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## 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?

2021 \_\_\_\_\_  
 2020 \_\_\_\_\_  
 2019 \_\_\_\_\_

What are <b>Clubs Dues</b> associated with membership?	2022	2021	2020
Family	\$ _____	\$ _____	\$ _____
Corporate	\$ _____	\$ _____	\$ _____
Single	\$ _____	\$ _____	\$ _____
Junior	\$ _____	\$ _____	\$ _____

What is the <b>Initiation Fee</b> ?	2022	2021	2020
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