

# Economic and Fiscal Impact Analysis – Prospect Questionnaire



**Note:** In an effort to objectively evaluate the economic and fiscal impact that your company may have on the City of Allen and Collin County, the Allen Economic Development Corporation (AEDC) will review and evaluate certain project specific information. Your assistance and cooperation in providing the referenced information is respectfully requested. Please complete the questions below and fax or email a completed copy of this form to the AEDC at 469-519-2385 (dbowman@allentx.com).

Date: \_\_\_\_\_

## A. Basic Company Information:

1. Company Name: \_\_\_\_\_

2. Person to contact concerning information entered on this questionnaire: \_\_\_\_\_

3. Address: \_\_\_\_\_ Phone: \_\_\_\_\_  
\_\_\_\_\_ Fax: \_\_\_\_\_

4. Ownership (check one): \_\_\_\_\_ Public Traded Stock or \_\_\_\_\_ Privately Held

5. Form of Business (check one): \_\_\_\_\_ Corporation \_\_\_\_\_ Joint Venture \_\_\_\_\_ Partnership or  
\_\_\_\_\_ 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 three year period***

**B. Company Business Activities:**

8. 2007 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 Allen facility (*attach additional sheets as necessary*):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Please attach a summary of the company's business to this questionnaire*

**C. Company's Proposed Allen Facility:**

11. Describe the Company's plans for expanding or locating in Allen (*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 Allen, 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

<u>Year</u>	<u>Land</u>	<u>Buildings &amp; Improvements</u>	<u>Furniture, Fixtures, &amp; Office Equipment</u>	<u>Industrial Machines &amp; Equipment</u>	<u>Total</u>
1	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
2	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
3	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
4	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
5	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
6	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
7	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
8	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
9	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
10	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
<b>Total</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>

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

<u>Year</u>	
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: \_\_\_\_\_  
(see attached sheet on the Triple Freeport Exemption for more information)

**E. Taxable Sales/Purchases**

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

*If you answered 'yes' to question 14, please complete questions 26-27*

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

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

27. Will Allen 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 Allen facility? (> \$500,000 annually)? \_\_\_\_\_

*If you answered 'yes' to question 17, please complete questions 29-30*

29. Projected annual taxable purchases for the Allen based operation (subject to state and local sales tax):

<u>Year</u>	
11	\$ _____
12	\$ _____
13	\$ _____
14	\$ _____
15	\$ _____
16	\$ _____
17	\$ _____
18	\$ _____
19	\$ _____
20	\$ _____

30. Approximately what percentage of these purchases will be executed with suppliers located outside the State of Texas? \_\_\_\_\_%

31. Will Allen 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 Allen? \_\_\_\_\_

**F. Employment and Payroll:**

33. How many individuals will the Company employ in Allen? \_\_\_\_\_  
*(if this is an existing company that is expanding in Allen, list only new employment positions)*

34. Will these employees be fulltime equivalent (FTE) positions? \_\_\_\_\_

35. What percentage of the projected employment positions would receive benefits? \_\_\_\_\_

36. New Employees to be hired each year (salaries *net* of benefits):

**Instructions**

- List only the *additional* employment positions created in Allen 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

<u>Year</u>	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	_____	_____	_____	_____	_____	_____	\$ _____
<b>Total</b>	_____	_____	_____	_____	_____	_____	_____

37. Of the total employment positions to be located in Allen, 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:	_____
<b>Total:</b>	100%

38. **If this project is a relocation from within the Dallas-Fort Worth Area**, please list the number of employees that currently live in the following zip codes:  
(only list employees that would be relocated to Allen)

Number	Percentage of Total Employment
75013: _____	_____
75002: _____	_____

39. **If this is NOT a relocation from within the Dallas-Fort Worth Area**, please list the percentage of employees that are projected to live in Allen: \_\_\_\_\_



48. Please include or describe any other information relative to the Company's future economic and fiscal impact on the City of Allen and Collin County below:

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

Signature: \_\_\_\_\_ Title: \_\_\_\_\_

Print Name: \_\_\_\_\_

Date: \_\_\_\_\_

**Attachments:**

- Company Financial Statements for Preceding Three Year Period
- Company Letter Describing Specific Incentive Request
- Summary of Business/Operations
- Aerial maps, site plans, floor plans, architectural renderings, etc. for proposed Allen location
- Other \_\_\_\_\_

**Thank You!**

The Allen Economic Development Corporation sincerely 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 Allen, Collin County, the Collin County Community College District, and the Allen Independent School District.

**Upon Completion of this Form:** Please e-mail completed copies of this questionnaire to [dbowman@allentx.com](mailto:dbowman@allentx.com) or fax completed forms to the Allen Economic Development Corporation at **469-519-2385**. If you have further questions, please contact us at **972-727-0250, or (toll-free) 877-425-5368**.