



NYC OFFICE LEASE PROPOSAL & TERM SHEET CHECKLIST

A STEP-BY-STEP WORKSHEET TO SECURE THE RIGHT DEAL



Use this checklist to define your needs, compare proposals, and negotiate the **best lease terms for your business** in New York City.

1 DEFINE YOUR NEEDS

- ☐ Company / Legal Name: _____
- ☐ Primary Contact: _____ Title: _____
- ☐ Email: _____ Phone: _____
- ☐ Target Move-In Date: _____
- ☐ Neighborhood / Submarket Preference: _____
- ☐ Approx. Square Feet Needed: _____
- ☐ Ideal Lease Term:
 - ☐ 3-5 Years ☐ 5-10 Years ☐ 10+ Years ☐ Flexible
- ☐ Target All-In Rent (per SF): \$ _____ / Annual Budget: \$ _____
- ☐ Must-Haves (e.g., private offices, windows, floor, elevator, amenity): _____

2 FINANCIAL PREPARATION

- ☐ Recent Financial Statements (P&L, Balance Sheet)
- ☐ Bank Reference / Letter
- ☐ Corporate Documents (Articles of Incorporation, EIN)
- ☐ Tax Returns (if applicable)
- ☐ Personal Financial Statement (if required)
- ☐ List of Principals / Guarantors



TIP: Having your financials ready upfront strengthens your proposal and speeds up landlord approval.

3 PRIORITIES & NOTES

Rank your top priorities (1 = most important)

- ☐ Rental Rate _____
- ☐ Free Rent / Concessions _____
- ☐ Tenant Improvement Allowance _____
- ☐ Location / Building Quality _____
- ☐ Lease Term / Flexibility _____
- ☐ Expansion / Renewal Options _____
- ☐ Other: _____

NOTES / QUESTIONS / NEXT STEPS

KEY TERMS TO REVIEW IN YOUR PROPOSAL / TERM SHEET

- | | |
|---|--|
| ☐ Base Rent | ☐ Renewal Options |
| ☐ Additional Rent (NNN) | ☐ Expansion Rights |
| ☐ Escalations (CPI / Fixed %) | ☐ Assignment & Subletting |
| ☐ Free Rent / Concessions | ☐ Security Deposit / Letter of Credit |
| ☐ Tenant Improvement Allowance | ☐ Utilities |
| ☐ Lease Term | ☐ Termination / Good Guy Clause |

WHY USE THIS CHECKLIST?

- ✓ Stay organized & save time
- ✓ Negotiate with confidence
- ✓ Avoid costly mistakes

THE LEASING PROCESS



QUICK REMINDER

Always consult your attorney and broker before signing any term sheet or lease. NYC leases are complex and every clause matters.



WE HELP BUSINESSES FIND AND NEGOTIATE BETTER OFFICE LEASES.
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