Real Estate Data Sheet
(To be completed by the Assistant Vice President of Estate Gift Planning)

Prospective Donor: ______________________________________________________

Location of Property: ______________________________________________________

Type of Property (personal residence, commercial, etc.): ______________________

Proposed Gift Arrangement:

___ Outright  ___ Estate  ___ CRT  ___ GA  ___ RLE  ___ Bargain/Sale Other:

Proposed Date of Gift: ______________________

1. Ownership and Use

___ Title—Donors current ownership interest

___ Number of Years of Ownership (purchased in 2017)

___ Structures or improvements, type and date of construction, number of floors,
   number of stories; materials used in construction

______________________________

___ Describe previous use of the property

______________________________

Current Deed:

___ Warranty Deed

___ Quitclaim Deed

___ Sheriff’s Deed

___ Other (specify) ________________

___ Copy of Deed in File: _____ yes _____ no

___ Warranty Deed prepared on behalf of charity: _____ yes _____ no

___ Current Updated Abstract: ______ yes _____ no

___ Title Insurance owned by donor: _____ yes _____ no  Copy in file: _____ yes _____ no

___ New Title Insurance to be purchased by donor: _____ yes _____ no

___ Survey
2. Environmental Review

_____ Has the property known or suspected to have been used as a dumping site, either legally or illegally, for disposal of solid or chemical waste? _____yes _____no
If yes, please explain:
_________________________________________________________________________________
_________________________________________________________________________________

_____ Any evidence or suspicion of asbestos-containing material or lead paint in the building(s)?

_____yes _____no      If yes, please describe:
_________________________________________________________________________________
_________________________________________________________________________________

_____ Are there any known or suspected above ground or underground storage tanks on or near the property including fuel oil, heating oil or gasoline? _____yes _____no     If yes, please describe, including distance from property:
_________________________________________________________________________________
_________________________________________________________________________________

_____ Are there any other environmental hazards on or near the property?

_________________________________________________________________________________
_________________________________________________________________________________

Types of review to be conducted

_____ Personal inspection by staff: date________________

_____ Inspection by qualified home inspector: date______________Copy in file: __yes __no

_____ Transaction Screen Questionnaire (has one been conducted by an engineer?)

_____ Pre-Phase I Environmental Review: date______________Copy in file: __yes __no

Phase I ER: date___________Copy in file: _____yes_____no

Phase II ER: date___________Copy in file: _____yes_____no

Phase III ER: date___________Copy in file: _____yes_____no
3. **Cash Flow Analysis**

- Income from rental or lease: $____
- Current yearly operating expenses $____
- Property taxes $____
- Insurance $____
- Electricity $____
- Heat $____
- Condominium/Homeowner Fees $____
- Road Maintenance $____
- Other $____

4. **Marketability**

- Current Qualified Appraisal: __yes__no  Date:__________
  Copy in file: __yes__no

- New Qualified Appraisal to be completed by date: ________________

- Describe recent efforts to dispose of property (e.g., efforts to sell, donate, etc.):

- Name all listing / selling agents used for property within the last two years:

- Any current mortgage, lien, debt, encumbrance, on property:

- Current zoning classification (found on real estate tax bill) / description of property:
Real Estate Data Sheet (Continued)
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_____ Current property use:

__ Rental Property  # of units_____ # of tenants_____  
Current Leases______ 

_____ Commercial

_____ Private

_____ Any known rights-of-way or easements on the property? (Please describe below):

__________________________________________________________________________
__________________________________________________________________________

_____ Proposed Use of the property upon sale or disposition?

__________________________________________________________________________
__________________________________________________________________________

_____ Describe condition of property:

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

_____ Describe surrounding neighborhood, properties, etc.:

__________________________________________________________________________
__________________________________________________________________________

_____ What is the type of current use and zoning of the property?  
(Does use comply with zoning?)

__________________________________________________________________________

_____ Are property taxes paid to date: ___yes ___no  
Amount owed: $__________  
Approximate annual property tax bill: $____________

_____ Property insurance currently on property: _____yes____ no
Approximate annual coverage amount: $______________